

APPENDIX 3

Customer Services Delivery Plan 2014/15

Overview of Customer Services

The Customer Services Team comprises of 1 Customer Service Manager, 1 Customer Service Team Leader, 7 Customer Service Advisors (4 FT, 3 P/T), 2 Customer Services Apprentices, 1 Web/CRM Development Officer (P/T 30hrs) and 1 Customer Engagement Officer (P/T 30hrs). The remit of the Customer Services team is to provide a front line service for all Council Services, delivering high levels of customer service and responding in a fast, efficient and helpful manner. A single point of contact for the public that is accessible to all including the development of the Council's website, making ease of use the main priorities and providing access to our services 24 x 7.

The team monitors the needs of customers, measures avoidable contact and customer satisfaction and works with service leads and partners to create positive communication channels, increase the number of customer interactions resolved at first point of contact, identify improvement opportunities and strives to develop services that meet the needs of our Customers

In addition to the above the team supports organisational change, policy and political decisions and presents them positively. They manage customer expectations by clearly communicating standards and response times and works to ensure that these are met. We maximise the use of technology and promote the use of self-service and more cost efficient channels such as the internet and online services via the web.

We are regulated by Government and have to have regard of numerous Government Acts and the Council's corporate aims of:

- maintaining sound finances by investing wisely, maximising income and providing effective and efficient services, and,
- when delivering our services our customers are at the heart of everything we do

The cost to run the service totals £304,661 per annum. This amount includes staffing costs for the Customer Service team and maintaining and developing the Council's website and the provision of Uniform to ECDC and ARP Customer facing staff.

Forward Planning for Councillors

Proposed date of decision	Item	Service Area	Service Delivery Champion	Committee
14 Jan 2015	Customer Service Charter	Customer Services	Elaine Griffin - Singh	Regulatory and Support Services Committee

Strategy map



Measuring Performance

Adapt Service To Meet The Needs Of The Customer	Target	Actual
Develop and implement a process for measuring Customer Satisfaction.	2 nd Jan 15	
Benchmark Customer Satisfaction.	31 Mar 15	
Undertake a review of the Council's Customer Service standards and values.	30 Nov 15	

Work with partners and services	Target	Actual
Measure and provide monthly reports on avoidable contact*	Quarterly	
Undertake cost benefit analysis of transferring ARP front of house staff into the Council's Customer Service team	31 Oct 14	
Conduct service meetings with partners to identify areas of improvement and anticipate and plan for future customer service needs.	Quarterly	
Pilot system to enable Customer Service Staff to manage planned and unplanned staff absence	1 st Nov 14	

Provide Single Point Of Contact	Target	Actual
Replace existing Customer Relationship Management system.	2 nd Jan 15	
Review and implement a revised Customer Complaint Procedure	2 nd Jan 15	
Provide complaint monitoring reports.	Quarterly	
% of Customer contact resolved at first point of contact.	80%	

Responsive and Accessible Services	Target	Actual
Develop and launch new self service portal on the web site	2 nd Jan 15	
Improve Self Serve signage in Reception.	1 st Dec 14	
Monitor each Service's performance and provide monthly service reports	Monthly	

Maximise Income	Target	Actual
Improve the customer experience and provide the opportunity for multitasking between ECDC and ARP staff.	2 nd Feb 15	
Ability to book a bulky waste collection on line	2 nd Jan 15	
Ability to pay a parking ticket on line	2 nd Jan 15	
Implement Chip and Pin facility at reception front desk	1 st Dec 14	

Staff Performance Measure	Target	Actual
Ensure all Customer Service Advisors and the CRM/Web team receive adequate training on relevant ICT systems, policy and procedure, contact handling and dealing with difficult customers.	Ongoing	
100% team meetings completed monthly.	100%	

100% of staff one to ones completed at least 4 times per year.	100%	
100% appraisals completed on time.	100%	
Service awareness briefings for Member Champion.	Quarterly	

*Avoidable contact is contact that adds little or no value to the customer – service failures, poor communication and signposting, progress chasing.

Delivering the service

Name	Develop A Process For Measuring Customer Satisfaction
Owner	Annette Wade
Co owners	Web and CRM Development Officer ,Customer Engagement Officer, Customer Services Team Leader
Purpose	To measure customer satisfaction (via all access channel). To understand what we are doing well and what improvements need to be made to meet customer's needs.
Links	Customer Service Charter
Formula	
Source of Data	
Frequency	Review annually
Target	2 nd Jan 2015
Rewards/Penalties	To inform decision making and service improvements to deliver services that meet the needs of the Customer.
Who measures?	Customer Services Manager
Who acts on the data?	Web and CRM Development Officer , Customer Engagement Officer, Customer Services Team Leader ,Customer Service Team
What will be done	<ol style="list-style-type: none"> 1. Research best practice. 2. Brainstorm at monthly team meeting and one to ones 3. Design a process that can be administered via all access channels. 4. Configure into new CRM system 5. Pilot via Customer Service Team and telephone contact. 6. Roll out across all access channels
Feedback	Monthly update to Service Leads Management team
Notes	

Name	Benchmark Customer Satisfaction
Owner	Annette Wade – Customer Service Manager
Co owners	Customer Service Team
Purpose	To determine current levels of customer satisfaction so that we have something to compare future consultations to. It will also enable us to establish whether service improvements introduced are successful.
Links	Customer Service Charter
Formula	Customers who are willing to take part in the satisfaction survey will be invited to rate their experience at the point of resolution.
Source of Data	CRM
Frequency	Measure Daily for 3 Month period Jan – Mar 2015
Target	31 st March 2015
Rewards/Penalties	Understand what works well and what doesn't, inform service improvement and decision making, provide comparison for future surveys.
Who measures?	To be confirmed
Who acts on the data?	Customer Service Manager. Management Team, Service Leads, Service Member Champion
What will be done	<ol style="list-style-type: none"> 1. Customer satisfaction process will be configured into new CRM system. 2. Customers will be asked if they wish to partake in Customer Satisfaction Survey 3. Satisfaction Survey to be administered at the point of resolution 4. Feedback collated for the period Jan 2015 – March 2014 5. Report published on the Intranet.
Feedback	Quarterly Performance report
Notes	Customer Satisfaction working group to be set up to ensure Customer satisfaction consultation is managed, focused and not too intrusive.

Name	Review Of The Council's Customer Service Standards
Owner	Customer Service Manager
Co owners	Management Team, Service Leads
Purpose	To challenge existing service standards and values - do they meet the needs of the customer? Establish what we will do, what we will not do, and where, how and when we will do it. To be based on the needs of the customer and any constraints of the service, not one size fits all.
Links	Customer Satisfaction
Formula	
Source of Data	
Frequency	To be reviewed annually.
Target	Review completed by 30 th November 2014
Rewards/Penalties	To inform staff of the Council's values and service levels they are expected to work to. To manage customer expectations therefore reduce avoidable contact. Increase customer satisfaction if service levels are met, decrease customer satisfaction if service levels are not met.
Who measures?	Customer Service Manager/Assistant Director Support Services
Who acts on the data?	Management Team, Service Leads, Service Member Champion
What will be done	<ol style="list-style-type: none"> 1. Gather existing information from services 2. Identify service areas which have no service levels i.e. response to tweets, work with the relevant service(s) agree new standards. 3. Research best practice and service levels and values set by other local councils 4. Draft customer standards based on all of the above... 5. Present to Service Leads to challenge and agree. 6. Re draft and seek approval from members
Feedback	Quarterly Performance report
Notes	

Name	Measure Avoidable Contact And Provide Monthly Reports
Owner	Annette Wade
Co owners	Customer Service Engagement Officer; Customer Services Team leader
Purpose	To share the Customer experience with each of the services, to identify what and when we are getting it right first time and when we are not. Services can then redesign the way their services and information are made more accessible to the public.
Links	Corporate Strategic Finance Outcome. Customer satisfaction
Formula	
Source of Data	CRM
Frequency	Quarterly - 1 st Reporting period 1 st Jan – 31 st March 2015
Target	100%
Rewards/Penalties	Dealing with avoidable contact costs time and resources that would otherwise be used to meet other service demands or resources that might simply wouldn't required at all, therefore reducing costs. A reduction in avoidable contact would reduce Customer frustration and customer satisfaction should increase as a result.
Who measures?	Customer Services Team Leader.
Who acts on the data?	Customer Services Manager, Customer Service Engagement Officer, Management Team, Service Leads, Service Member Champion
What will be done	<ol style="list-style-type: none"> 1. Customer Services Manager to develop a system that measures avoidable contact. 2. CRM system configures to record avoidable contact. 3. Reports developed to extract quarterly data 4. Customer Services team to be trained how to use system. 5. Reports extracted quarterly and circulated for information. 6. Contents of the reports and service improvement opportunities will be discussed at quarterly service meetings.
Feedback	
Notes	Avoidable contact is contact that adds little or no value to the customer – service failures, poor communication and signposting, progress chasing.

Name	Transfer Of ARP Front Of House Staff To ECDC
Owner	Annette Wade
Co owners	Assistant Director Support Services
Purpose	To improve Customer Service and generate benefits and efficiency savings for both the Council and ARP
Links	ARP
Formula	
Source of Data	
Frequency	
Target	For completion of cost benefit analysis 31 st Oct 2014. Transfer of staff if to go ahead 1 st April 2015.
Rewards/Penalties	On site management of staff. Multitasking between ARP and ECDC staff resulting in improved customer service experience. Improved resilience, potential management and staff savings. ARP staff feel supported, valued, included, and happy.
Who measures?	Annette Wade & Assistant Director
Who acts on the data?	Management Team
What will be done	<p>Cost Benefit Analysis</p> <ol style="list-style-type: none"> 1. Identify benefits & Research TUPE implications 2. Gather information i.e. employees contract terms and conditions, length of service, pay and pay scales etc. any employee related liabilities. 3. Identify Costs & Confirm ARP contribution 4. Way up pros and cons of TUPE transfer and provide recommendation. 5. Inform trade unions, employee representatives & employees of a potential transfer if required <p>If Transfer Approved - Effective date 1/4/2015</p> <ol style="list-style-type: none"> 1. Construct TUPE transfer Plan 2. Set up communication channels with all relevant parties to ensure smooth transition. Engage with trade unions and elected representatives 3. Inform and actively consult with the employees and affected staff. Ensure all HR issues agreed and completed 4. Ensure that all equipment ICT systems have been set up etc 5. Plan an induction process. 6. Use induction process to welcome transferred staff and introduce them to rules policies and standards that they are expected to work to 7. Give time to adjust- making sure line managers make reasonable allowance during this period 8. Resolve any issues as soon as quickly as possible.
Feedback	
Notes	

Name	Service Meetings with Service Leads and Partners
Owner	Annette Wade
Co owners	Sue Garwood – Web/CRM Development Officer; Karen Carter – Customer Service Engagement officer; Helen Sarkies – Customer Services Team Leader.
Purpose	To discuss performance, what is working well, what could be improved? Review of existing scripts, web pages and e-forms. Identify what is coming up to anticipate customer service requirements and plan accordingly.
Links	Customer Service Charter
Formula	
Source of Data	Feedback from front and back office, Performance reports extracted from the CRM system.
Frequency	Quarterly
Target	100%
Rewards/Penalties	Joined up working between front and back office. Customer Service Improvements. Possible efficiency savings
Who measures?	Annette Wade
Who acts on the data?	Annette Wade – Relevant Service lead
What will be done	<ol style="list-style-type: none"> 1. Meetings arranged with service partners and leads. 2. Agenda and relevant documentation sent out a week prior to meeting. (Agenda to cover, Actions from pervious meetings existing service delivery, what works well what doesn't, scripting and hand off between front and back office, web pages, performance reports and customer feedback, service improvement opportunities, what is coming up). 3. Minute meeting, create an action plan and circulate 4. Actions that require additional funding request business case for approval by Management Team. 5. Work with service leads and partners to deliver service improvements
Feedback	Quarterly Performance reports
Notes	

Name	Pilot System To Enable Customer Service Staff To Manage Planned And Unplanned Staff Absence.
Owner	Annette Wade
Co owners	Customer Service Team Leader, Customer Service Advisors
Purpose	To improve communication between front and back office and manage customer expectations.
Links	Customer Satisfaction. Reduction in avoidable contact.
Formula	
Source of Data	Services to provide
Frequency	Pilot for 3 months from 1 st Nov 2014 to continue if successful
Target	100%
Rewards/Penalties	Customer Services can use this information to allocate customer contact enquiries requiring back office resolution and manage customer expectations.
Who measures?	Customer Services Team Leader
Who acts on the data?	Customer Service Manager
What will be done	<ol style="list-style-type: none"> 1. Process to be developed in consultation with Customer Service Team. 2. Customer Service Team and back office services trained to use process. 3. Pilot for 3 months 4. Evaluate 5. Continue or Cease.
Feedback	
Notes	Avoidable contact in this case is transferring a call to a member of staff who is on planned or unplanned absence.

Name	Replace Customer Relationship Management System
Owner	Annette Wade – Customer Services Manager
Co owners	Sue Garwood - Web and CRM Development Officer & Karen Carter Customer Engagement Officer, Helen Sarkies Customer Services Team Leader
Purpose	To provide the infrastructure to deliver self service, record and monitor customer contact and service performance against agreed service standards and provide customer insight to inform service improvement and decision making.
Links	Local Land Property Gazetteer. Customer Service Charter, Complaints Procedure
Formula	
Source of Data	CRM System
Frequency	
Target	Go live date 2 nd January 2015
Rewards/Penalties	Improved system performance. Ability to produce service and performance monitoring reports. Improved self service functionality. Increase self service contact.
Who measures?	Customer Service Manager and Assistant Director
Who acts on the data?	All service leads and their teams. Veolia and ARP and their teams
What will be done	<ol style="list-style-type: none"> 1. Procurement of New system 2. Meet with all service areas to <ul style="list-style-type: none"> - review their use of the current CRM system, what works well and what doesn't. - Review online forms, scripts and web data used to inform, direct and resolve customer enquiries. - identify service improvements and reporting requirements. 3. Build and configure new system 4. Extract and transfer existing customer details 5. Undertake User Acceptance testing and training. 6. PR exercise to encourage existing self service users to re- register with the new system 7. Go live.
Feedback	Monthly project update to Service Leads/Management team
Notes	

	Review Customer Complaint Procedure
Owner	Annette Wade
Co owners	Customer services Team
Purpose	To provide central point of contact for the recording, management and monitoring of Customer Comments, Compliments and Complaints.
Links	
Formula	
Source of Data	CRM system
Frequency	Reviewed Annually
Target	Review completed by 30 th November 2014. Go Live 2 nd January 2015
Rewards/Penalties	The recording and central management and administration complaints within the CRM system and Customer Service team will provide consistency, effective reporting and negate the need for individual services to maintain and administer their own complaint recording systems. It will also record comments and compliments useful information to assist with service development and improvement.
Who measures?	Customer Services Manager
Who acts on the data?	Management Team/Service leads
What will be done	<ol style="list-style-type: none"> 1. Review existing Customer Complaints procedure and best practice 2. Draft revised customer complaint procedure 3. Revised Procedure approved 4. The administration and management of 3”C”s configured within the Council’s CRM System. 5. User acceptance testing and user training. 6. Go live
Feedback	Quarterly performance reports
Notes	

Name	Provide Complaint Monitoring Reports
Owner	Annette Wade
Co owners	Customer Service Team Leader.
Purpose	To provide performance information for Management Team and Council Members provide information for comparison throughout each year and subsequent years thereafter.
Links	
Formula	
Source of Data	CRM
Frequency	Quarterly – 1 st reporting period 1 st Jan – 31 st March 2015
Target	100%
Rewards/Penalties	Central management and reporting will Identify veracious or serial complainers. Provide the opportunity to learn from mistakes and inform service improvement future decision making...
Who measures?	Annette Wade
Who acts on the data?	Management Team/Service leads
What will be done	<ol style="list-style-type: none"> 1. All complaints to be administered centrally via CRM System 2. Reports to be extracted quarterly APR – June, July – Sept, Oct – Dec. Jan – Mar 3. Circulated to Service leads and presented to MT
Feedback	Quarterly performance reports
Notes	

Name	Customer Contact Resolved at First Point of Contact.
Owner	Annette Wade
Co owners	Customer Services Manager
Purpose	To provide a professional and efficient service to the customer and keep customer contact costs to a minimum.
Links	Corporate Strategic Finance Outcome.
Formula	
Source of Data	CRM
Frequency	Quarterly
Target	80%
Rewards/Penalties	The majority of contact made to the Council does not require a professional skilled officer to respond. Providing online services and developing scripts for Customer Service Advisors to use will enable customers to self serve and allow the Customer Service team to resolve customer contact directly, thus freeing up officer time in the back office to get on with the day job.
Who measures?	Customer Services Team leader
Who acts on the data?	Customer Services Manager, Assistant Director, Customer Services Engagement Officer
What will be done	<ol style="list-style-type: none"> 1. All contact will be entered into the CRM System. 2. Reports will be extracted quarterly and measured against performance targets 3. Performance reports will be discussed at Service meetings
Feedback	Provide Quarterly Monitoring Reports
Notes	

Name	Develop and Launch Customer Service Portal
Owner	Web/CRM Development Officer, Customer Engagement Officer.
Co owners	Customer Services Manager.
Purpose	To provide 24 x7 access to services and to facilitate and encourage the use of self service, the most cost efficient access channel.
Links	Customer Satisfaction. Corporate Strategic Finance Outcome.
Formula	
Source of Data	Firmstep CRM.
Frequency	
Target	2 nd Jan 2015
Rewards/Penalties	If the portal meets the customer needs and is easy to use it will encourage people to self serve and increase the channel shift to a more cost efficient method of contact
Who measures?	Customer Services Manager
Who acts on the data?	Customer Services Manager, Assistant Director
What will be done	<ol style="list-style-type: none"> 1. Self Service requirements identified 2. Self Service Configured 3. Integrated with Council's Website and Payment System 4. Security protocols set up 5. Process for re-registering existing self service customers identified and actioned. 6. Training given to relevant staff. 7. Promotion and go live.
Feedback	
Notes	

Name	Improve Self Serve Signage
Owner	Annette Wade
Co owners	Customer Engagement Officer
Purpose	To raise awareness and promote the use and efficiencies of self service kiosks in Reception.
Links	Corporate Strategic Finance Outcome. Customer Service Charter
Formula	
Source of Data	
Frequency	
Target	By 1 st December 2014
Rewards/Penalties	Increased use of self serve. Alternative access channel for Customers. Reduce queuing and waiting times for Customer
Who measures?	Customer Services Manager
Who acts on the data?	Customer Services Manager
What will be done	<ol style="list-style-type: none"> 1. Agree what is required - no of signs, size, where they are going to go, words etc 2. Procure signs 3. Install 4. Monitor usage
Feedback	Quarterly Performance Reports
Notes	

Name	Monitor Service's Performance And Provide Monthly Service Reports.
Owner	Annette Wade
Co owners	Management Team, Service Leads, all ECDC staff and partners using the Council's CRM system.
Purpose	To update Service Leads on their service's performance against agreed customer service standards. To provide them with information as to why the customer has contact and their needs, help them to identify what is working well and what isn't, to inform service delivery improvement and service focus. Providing quarterly reports will enable them to compare and learn if new initiatives worked etc.
Links	Corporate Strategic Finance Outcome. Customer satisfaction. Developing a service that meets Customer needs.
Formula	
Source of Data	
Frequency	Monthly
Target	100%
Rewards/Penalties	Services need to know how they are performing against agreed service standards what is working what is not and why the customer is contacting them to enable them to develop a service that meets customer needs. It will also provide information for resource planning.
Who measures?	Customer Services Manager
Who acts on the data?	Management Team, Service Leads, Service Member Champions
What will be done	<ol style="list-style-type: none"> 1. CSM, CRM Web/Dev Officer/Customer Engagement officer to understand how reports work in New CRM system – who and how they are accessed customised etc. 2. CSM to draft and extract a set of standard reports 3. Draft reports circulated to MT Service Leads, Service Champions for feedback/comment/additional requirements etc. 4. CSM to amend reports as required. 5. Report training given to relevant members of staff (if it is possible for individual services to run their own reports). 6. CSM to provide quarterly reports. 7. Publish on Intranet
Feedback	Monthly Performance reports
Notes	

Name	Long Abandoned Call Rates
Owner	Customer Services Team Leader
Co owners	Customer Services Manager, Assistant Director.
Purpose	To measure customer service performance. For resource planning
Links	Corporate Strategic Finance Outcome. Customer Satisfaction.
Formula	
Source of Data	Mitel System
Frequency	Weekly
Target	92%
Rewards/Penalties	Happy/Satisfied customers or Unhappy/frustrated customers
Who measures?	Customer Services Team Leader
Who acts on the data?	Customer Services Team Leader, Customer Services Manager, Assistant Director.
What will be done	<ol style="list-style-type: none"> 1. Abandoned call rates extracted from Mitel System 2. Results measured against performance target 3. Performance discussed within team and with Assistant Director, improvements identified and actioned as necessary. 4. Results to be circulated quarterly to MT and member Champion.
Feedback	Quarterly Performance Reports
Notes	An abandoned call is a call initiated to the Council that is ended before any conversation occurs. We can only measure the calls to the main council number, we cannot measure calls made to direct dial numbers.

New Queuing Systems in Reception	
Name	
Owner	Annette Wade
Co owners	Helen Sarkies - Customer Services Team Leader
Purpose	A central queuing system will provide clear direction to customers and prevent them from waiting in the wrong queue. It will also provide the opportunity to multitasking between ECD and ARP staff.
Links	Customer Service Charter (waiting times)
Formula	
Source of Data	
Frequency	
Target	2 nd February 2015.
Rewards/Penalties	Improved Customer Satisfaction. It will provide a more personal service for Customers needing to speak to ARP as customers will be asked to take a seat and wait to be called. Customer Advisors can advise Customers of how many are in the queue before them and of likely waiting times – giving the customer the informed choice of whether to stay or come back later. Less people waiting near the counter provides a more personal and confidential customer experience. It will also provide the ability to monitor waiting times and adapt the service if necessary.
Who measures?	Customer Services Team Leader
Who acts on the data?	Annette Wade – Customer Services Manager
What will be done	<ol style="list-style-type: none"> 1. Consult with ARP and Customer Service Advisors 2. Queue set up with in CRM System. 3. Provide ARP with Access to ECDC CRM 4. Conduct Customer Service Advisors and ARP user training 5. Rearrange ARP and ECDC workstations on front desk. 6. Clear signage and direction in Reception.
Feedback	
Notes	

Name	Ability to Book Bulky Waste on Line
Owner	Customer Services Engagement Officer
Co owners	Web/CRM Development Officer; Customer Services Manager
Purpose	To meet customer's expectations.
Links	Customer Satisfaction; Corporate Strategic Finance Outcome.
Formula	
Source of Data	
Frequency	
Target	2 nd January 2015
Rewards/Penalties	Maximise income and shift transactions to a lower cost access channel.
Who measures?	Customer Services Manager and Assistant Director (Support Services)
Who acts on the data?	Annette Wade
What will be done	<ol style="list-style-type: none"> 1. Customer Engagement Officer to liaise with relevant departments/officers and develop a process, scripts and form design. 2. Draft process, scripts and on line form. 3. Circulate drafts for comment approval 4. Design form processes and scripts in CRM 5. Undertake user acceptance testing 6. Promote and go live
Feedback	
Notes	

Name	Ability to Pay a Parking ticket on line
Owner	Customer Services Engagement Officer
Co owners	Web/CRM Development Officer; Customer Services Manager
Purpose	To meet customer's expectations.
Links	Customer Satisfaction; Corporate Strategic Finance Outcome.
Formula	
Source of Data	
Frequency	
Target	2 nd January 2015
Rewards/Penalties	Maximise income and shift transactions to a lower cost access channel.
Who measures?	Customer Services Manager and Assistant Director (Support Services)
Who acts on the data?	Annette Wade
What will be done	<ol style="list-style-type: none"> 1. Customer Engagement Officer to liaise with relevant departments/officers and develop a process, scripts and form design. 2. Draft process, scripts and on line form. 3. Circulate drafts for comment approval 4. Design form processes and scripts in CRM 5. Undertake user acceptance testing 6. Promote and go live
Feedback	
Notes	

Name	Implement Chip and Pin facility at Reception Front Desk
Owner	Customer Service Manager
Co owners	Customer Service team leader, Customer Service Advisors
Purpose	To meet Payment Card security compliance and meet Customer Expectations
Links	Corporate Strategic Finance Outcome. Customer Satisfaction
Formula	
Source of Data	
Frequency	
Target	1st December 2014
Rewards/Penalties	The Council is currently being fined in excess of £100 per month for not complying to the Payment Card Security Standard and if not rectified the Council could be open to heavier fines or prevented from taking any card payments via all access channels at all. Chip and pin is part of every day life and Customers are no longer happy to hand their cards over to Customer Service Advisors, therefore, this will increase Customer confidence and remove the front line staff from challenges to our existing process, being accused of fraud when something goes wrong and picking up germs from handling cards, which, essentially are as “dirty” as money.
Who measures?	Customer Services Manager
Who acts on the data?	Customer Services Manager, Assistant Director, ICT and Finance
What will be done	<ol style="list-style-type: none"> 1. Customer Services manager to seek costs from Northgate 2. Identify Budget 3. Identify “people” resources, this include ICT, Finance and Northgate staff 4. Raise PO 5. Produce project plan to include communication, implementation, training, testing and go live 6. Monitor progress against plan.
Feedback	
Notes	

Name	Customer Service Staff Receive Adequate Training To Successfully Fulfil Their Duties.
Owner	Customer Service Advisors
Co owners	Helen Sarkies – Customer Services Manager
Purpose	To resolve customer contact at the first point of contact. To be able to provide valuable support to Council Services and their own team members. To be able to deal with difficult customers and challenging behaviour.
Links	Customer Service Charter
Formula	
Source of Data	
Frequency	As and when required
Target	
Rewards/Penalties	Increased customer confidence and satisfaction. Reduction in avoidable contact. Increased staff morale, confidence and output.
Who measures?	Customer Services Manager and Assistant Director (Support Services)
Who acts on the data?	Customer Services Manager and Customer Services Team leader
What will be done	<ol style="list-style-type: none"> 1. New starters undertake comprehensive induction programme and one to one training provided by Customer Service team leader. 2. Each CSA given a buddy/mentor 3. Customer Service Team Leader to monitor Customer Service Advisors's Performance and identify any training needs and discuss at one to ones 4. Customer Service Advisors to assess their own training needs and discuss at one to ones. 5. Customer Service Team Leader to feed in to the appraisal process or seek to provide immediate training if appropriate.
Feedback	Training needs picked up at one to ones and at mid term and annual appraisal
Notes	

Name	Monthly Team Meeting Held and Documented
Owner	Annette wade
Co owners	Customer Services Team
Purpose	To provide a face to face communication channel for the Customer Services Team and Member Champion to update and receive feedback about all aspects of the Council's business and provide the opportunity for the team to work together and contribute to the development and improvement of Customer Service within the Council.
Links	
Formula	
Source of Data	
Frequency	Monthly
Target	100%
Rewards/Penalties	Informed and included staff = improved customer service and happier team and working environment. Valuable feedback from CSA's to inform customer services development and improvements that meet the customer's needs.
Who measures?	
Who acts on the data?	Customer Services Manager – Assistant Director
	<ol style="list-style-type: none"> 1. Customer Service Manager to invite items for agenda 2. Customer Service Manager to prepare agenda and distribute a week before meeting. Agenda to include MT update, Core Brief, Performance against priorities, what is working well what improvements could be made, what is coming up. 3. Meeting minutes and actions noted and circulated 4. Actions monitored to completion.
Feedback	
Notes	Member Champion invited to all team meetings

Name	One to Ones Held And Documented.
Owner	Customer Services Manager and Customer Services team Leader.
Co owners	Customer Service Advisors, Web/CRM Development Officer, Customer Engagement Officer.
Purpose	To provide the opportunity for individual members of the team to raise and discuss issues of concern, individual performance and identify training needs.
Links	Service Delivery. Team performance and Appraisal process.
Formula	
Source of Data	CRM and Motel Performance stats. Customer Service Manager Observations
Frequency	At least Quarterly
Target	100%
Rewards/Penalties	Member of staff feels valued, inclusive ownership and understand how they are contributing to the team. Staff Morale.
Who measures?	Customer Services Manager – Assistant Director
Who acts on the data?	Customer Services Manager, Customer Service Team Leader
What will be done	<ol style="list-style-type: none"> 1. Meetings arranged with individual staff. 2. Discussions will include individual work/action plans, performance, identify training needs. 3. Meetings and actions documented, circulated. 4. Actions monitored until completed.
Feedback	
Notes	

Name	Appraisals Completed On Time.
Owner	Customer Services Manager; Customer Services Team Leader.
Co owners	Customer Service Advisors, Web/CRM Development Officer, Customer Engagement Officer.
Purpose	To ensure that all staff appraisals be completed annually and within the time frame set by HR.
Links	HR Policy and Procedure
Formula	To arrange in and complete all staff appraisals within time frame set by HR ensuring that all staff have enough time to complete their comments and for Customer Services Manager and team Leader Officer to complete appraisal and agree with staff member before signing. Identify training needs. Opportunity to discuss what has gone well and what needs improving and aspirations for the future...
Source of Data	HR, Customer Services Manager, Customer Services Team Leader and Staff member
Frequency	Yearly
Target	100%
Rewards/Penalties	If not completed staff will be unaware of their progress throughout the year, would not know what areas to improve upon therefore not providing the best service possible to the clients. Effect on staff morale.
Who measures?	HR, Customer Services Manager, Customer Services Team Leader
Who acts on the data?	Customer Services Manager, Customer Services Team Leader
What will be done	<ul style="list-style-type: none"> • Time frame set by HR • Customer Services Manager and team leader to book appraisals with staff • Customer Services Manager and Team Leader to issue staff with paperwork to complete (giving enough time in which to do so) • Customer Services Manager and Team Leader to complete appraiser's comments • Appraisal conducted by Customer Services Manager and Team Leader, staff and managers comments discussed and additional comments added to paperwork. • Completed paperwork to be passed to Customer Services Manager for review and final signature. • Completed appraisals to be sent to HR.
Feedback	1:1, mid term appraisal
Notes	Any discussion at appraisals should not come as a surprise; issues that arise regarding performance should be dealt with in a timely manner

Name	Service Awareness Briefings for Member Champion.
Owner	Annette Wade
Co owners	Customer Services Team
Purpose	To update Service Delivery champions with progress within the Customer Services Team, how the service is being operated and budgetary updates. Service Delivery Champion to act as critical friend.
Links	Corporate Strategic Finance Outcome. Customer Service Charter.
Formula	To include Service Delivery Champions in all aspects of the running of the Customer Services department to promote transparency and good partnership working. Members will be able to understand the everyday running of the department and will be able to offer assistance where required.
Source of Data	Regular feedback from Members and CE.
Frequency	As required
Target	100%
Rewards/Penalties	Members need to have an awareness of the service in order for it to move forward. They will act as a critical friend to the service and their role is to understand the complexities of Customer Services and the Web see how changes will benefit the effectiveness of the team and the service it provides to the community and report to the Council on their activities and respond to questions and enquiries.
Who measures?	Customer Services Manager and Assistant Director
Who acts on the data?	Customer Service manager and the team
What will be done	<ol style="list-style-type: none"> 1. Identify Member Champion 2. Customer Services Manager to invite member to regular meetings 3. Invite Member to shadow the team if they wish 4. Invite member to attend Customer Services Team meetings 5. Include Member in the distribution of quarterly performance reports.
Feedback	
Notes	

Name	Reduction Of Duplicate Cases and Customers
Owner	Customer Services Team leader
Co owners	Customer Services
Purpose	To support channel shift to self service - the more efficient method of contact and to reduce avoidable contact and improve communication between front and back office.
Links	Corporate Strategic Finance Outcome. Customer Satisfaction Reduction in avoidable contact.
Formula	
Source of Data	CRM
Frequency	Quarterly
Target	To be confirmed
Rewards/Penalties	All information in one place - nothing will get missed everyone sees the whole picture enabling improved communication and understanding and the provision of a more professional and efficient service to the customer.
Who measures?	Customer Services Team Leader
Who acts on the data?	Customer Services Team leader, Customer Services Team Manager.
What will be done	<ol style="list-style-type: none"> 1. Reduction in duplicate cases to be added to CSA's accountabilities. 2. Customer Services to extract reports daily. 3. Customer Service team to "de-duplicate" cases and customers on a daily basis 4. Customer Service team leader to monitor and to provide quarterly performance reports to Customer Service Manager. 5. Customer Services Manager to discuss at team Meetings 6. Customer Services Manager to discuss at individual one to ones.
Feedback	
Notes	

Name	Accuracy of Data
Owner	Customer Services Team leader
Co owners	Customer Services Manager
Purpose	To provide a professional and efficient Customer Service. To support channel shift to self service - the more efficient method of contact and to reduce avoidable contact and improve communication between front and back office.
Links	Corporate Strategic Finance Outcome. Customer Satisfaction. Reduction in avoidable contact.
Formula	
Source of Data	CRM
Frequency	Quarterly
Target	100%
Rewards/Penalties	The majority of negative feedback from the back office is regarding inaccurate data. Wrong phone numbers in particular. This does not portray a professional service to the customers that self serve. Monitoring this will enable the Customer Service team to design a process that will eliminate or significantly reduce the incidence of this and also allow the team to evaluate their team and individual performance.
Who measures?	Customer Services Team Leader
Who acts on the data?	Customer Services Team leader, Customer Services Team Manager.
What will be done	<ol style="list-style-type: none"> 1. 100% accuracy of data to be added to CSA's accountabilities. 2. Customer Services team Leader and Customer Services Manager to develop a process that can monitor data accuracy. 3. Customer Service team leader to communicate to CSA's and implement. 4. Customer Service team leader to provide quarterly report for Customer Services Manager. 5. Customer Services Manager to discuss at team Meetings. 6. Customer Services Manager to discuss at individual one to ones.
Feedback	
Notes	