

Epping Forest District Council

Customer Contact Review

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Customer Contact Review Report – Scope and Team

January 2016

- **Project scope statement**

To review customer contact and produce proposals to achieve 'one contact' for most of the Council's customers, and to provide easy, efficient and appropriate arrangements for all customer contact by:

- (a) research to identify and quantify existing customer contacts and good practice;
- (b) research to inform understanding of options for:
 - (i) bring forward proposals for a rationalised reception service
 - (ii) channel shift to appropriate channels
 - (iii) Customer Relationship Management (CRM) system fit for purpose
- (c) discuss with other agencies to gauge their level of interest in sharing services;
- (d) proposals to increase website adoption and transactions.
- (e) Member involvement and consultation as appropriate and identified by client
- (f) an outline cost/benefit analysis of options identified
- (g) identify likely future expenditure

The Council has set up a multi-disciplinary team to undertake and report to Management and members on these matters.

- **Team members**

Simon Hill – Project Group Chairman
Barbara Copson – Project Manager

Stream 1 Team:

Simon Hill - Governance - Lead
Sarah Kits – Governance
Roger Wilson - Communities

Stream 2 Team:

Tom Carne Governance - Lead
Ian Willis – Resources
Jo Mower - Communities

Stream 3 Team:

Steve Bacon – Resources – Lead
Julie Barnard – Neighbourhoods
Peter Freeman – Resources

Many thanks for the time and support of these officers in undertaking research and putting forward their views and assisting with the compiling of this report.

The Head of Transformation and the Technology and Support Services Portfolio Holder also attended meetings by invitation and helped shape our thinking.

- **Report requested by and Submitted to:**

Management Board/Cabinet Members

- **Client:**

G Chipp, Chief Executive

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Introduction

The means by which customers and partners interact with Epping Forest District Council varies enormously between sections and services.

The Council has previously attempted to implement a more organised Customer Service centric approach to its services. The problems identified by Steria¹ stem from a study in June 2005. The Council has felt unable to implement these customer focussed changes as it has felt the price tag was too high when weighed against its other priorities.

The Council recognises that, with the diminishing resources available to it, a review of our procedures is timely and added a review to its Key Objectives in 2015-16. This report is a start in seeking answers to improving our performance.

Answering enquiries

Without a strategic approach to customer contact, the use of different customer contact channels and service provision has evolved on a piecemeal basis. There are areas where these are well developed at sectional level but other where it is not. While some service areas have adapted to the changing expectations of customers and use of technology, other service areas have retained more traditional forms of contact.

Telephone answering performance has improved since 2005 but there are still pockets where it is poor.

Reception Areas

The Civic Offices building itself is approaching 30 years of age. No radical changes have been made to the layout of its building or reception areas in that time. Remedial repairs being carried out this year to various areas.

The reception areas do not meet modern accessibility standards. The main desk requires work and there are operational issues. The building has a number of different receptions for services which means that visitors use different buildings and floors to access services.

Channel shifting

Customers are familiar with channel shift - the process whereby the traditional means of service delivery such as post, phone and face to face contact is increasingly replaced by electronic, remote communication. Channel shift is increasingly identified with self-service, the internet, websites and social media.

However, to achieve the full benefits of channel shift, the organisation must review the full work flow process known as business process mapping. Rather than just bolting new forms of communication onto the 'front end' of service delivery, channel shift requires a root and branch review of workflow processes, procedures and technology to realise full organisational benefits as well as customer service.

CRM

The previous reviews of Customer Contacts noted the lack of a Customer Relationship Management (CRM) system. At that time CRM systems were generally large complex systems with a prohibitive cost. Technology has changed over time and customer contact recording has not been centrally managed or captured.

¹ Steria Contact Scoping Study report 9 June 2005

- **Executive Summary**

The main report is split into three work streams:

Stream 1 - Centralised Reception in Civic Offices and Answering Enquiries at First Contact

Stream 2 – Channel Shift

Stream 3 – Implementation of a Contact Relationship Management System

Each Stream of work has come forward with its own conclusions and recommendations which are summarised below.

Each section of the main report discusses the stream discovery in greater detail.

The Working Group has concluded that the Council should pursue improvements to our customer contact arrangements, brings forward the work it has been able to undertake to establish a basis for that view, and suggests that further work will be required as part of the Transformation Programme to take the project forward.

The conclusions are as follows:

Stream 1:

- (1) Good customer service exists here and needs to be replicated across the Council.
- (2) Telephone answering performance has improved considerably since 2005/6, with much lower levels of call abandonment, albeit with pockets of low performance. These may be restrained by organisational requirements.
- (3) The Council needs to understand the types and quantities of customers and the customer's journeys. Further work is required to inform future service provision.
- (4) The centralisation of the main reception has met with support and should now be subject to a full feasibility design and further report to members.
- (5) The Council needs to decide whether it wishes to centralise its main call handling and if so, needs to appoint a suitable officer to lead this change.
- (6) Multi-skilling of customer facing officers will be required for which training will form an important element and will have an organisational impact
- (7) A scalable response to peaks in enquiries is required in any event and further modelling of this will be informed by study.
- (8) Dealing with accommodation matters in a sequential way will hold back implementation until at least 2018. If it is desired to implement this earlier then some Communities staff will need to be relocated.
- (9) Repairs to the atrium windows or their complete replacement are required and should be added into the building maintenance programme now.
- (10) Centralised change needs project management and IT systems support.
- (11) If the Council decides to keep its call handling separate, then consideration needs to be given to how mutual support can be given and how other services can be supported going forward.

Stream 2:

- (1) That the Council needs to conduct further analysis of current channels available to service areas.
- (2) That the Council undertakes Business Process Mapping to establish where changes to processes and procedures can be developed in conjunction with channel shift.
- (3) That the Council identify priority areas (ie those areas where the greatest impact can be achieved most rapidly in the most cost efficient manner).
- (4) That the Council should implement channel shift in these priority areas first.

Stream 3:

- (1) That officer support for any implementation of a CRM or CRM (light) solution is needed within ICT.
- (2) That an evaluation of potential software should now be undertaken.
- (3) That the number of licenses for a new system is based upon the decisions on whether a centralised or decentralised call centre methodology is followed.
- (4) That each potential system integration will cost money and should be subject to formal cost/benefit analysis

This has led us to make the following recommendations.

• Recommendations

It is acknowledged that management and members could choose which of our recommendations to pursue. Some recommendations will have financial implications and others would lead to organisational change wider than just customer service improvement.

Stream 1 - Centralised Reception in Civic Offices and Answering Enquiries at First Contact

- (1) Management Board and Members need to lead this project to move it forward.
- (2) That consistent visitor data recording should be undertaken by all reception areas and services routinely for a period of three months to provide a base line to inform the project.
- (3) That a decision be made to move to centralised or maintain a decentralised customer service team arrangement and then undertake the consequential recommendations.
- (4) If centralised:
 - (a) shut the switchboard and place a Customer Contact Centre (CSC) in between customers and officers to drive call traffic.
 - (b) Develop the current environmental services team as the hub of a main contact centre as a starting point.
 - (c) Appoint a Customer Services Manager to drive the process forward
 - (d) Develop a plan for the gradual movement of most enquiries to that team over time.
- (5) If decentralised:
 - (a) Formalise the processes that would allow call centres to provide mutual support.
 - (b) Deal specifically with those service areas where call answering is poor;
 - (c) Develop a programme of staff training based upon specific support needs and systems;
 - (d) A CRM is still going to be required

- (e) Look at how the switchboard operators can be assisted during peak times.
- (6) That a single central reception has support and is required if front line customer service is to remain in Epping and reception services are to be co-located;
- (7) That the programme should not wait for an accommodation strategy during the overall transformation programme thus treating it as an exception or starting point.
- (8) That Facilities Management be requested to draw up a feasibility design based on the requirements set out in this report.
- (9) That further 'open' counter space is needed and should be taken into account in the design.
- (10) That Director of Neighbourhoods consider how recycling bag distribution can be improved so that residents do not need to attend these offices to collect bags.

Stream 2 – Channel Shift

That Channel shift is considered to be not only desirable but an inevitable consequence of evolving technology. In order to maximise the benefits of channel shift from a customer and an organisational perspective, the report proposes:

- (1) Adoption of the principle of Channel Shift to meet and reflect evolving customer service requirements.
- (2) Subject to 1 (above), to conduct further analysis of current channels available to service areas.
- (3) Business process mapping to establish where changes to processes and procedures can be developed in conjunction with channel shift.
- (4) Identification of priority areas (ie those areas where the greatest impact can be achieved most rapidly in the most cost efficient manner).
- (5) Prioritise and implement channel shift in areas identified in (4) above.

Stream 3 – Implementation of a Contact Relationship Management System

- (1) That the Council should progress an additional ICT post to support the development of the form system and related integration to allow:
 - Migration of existing current Achieve Forms to the new 'Self' portal as a precursor to any CRM implementation, and to assist channel shift (cost of £36,000 p/a for 50 seat implementation).
 - Creation of a corporate customer contact capture form again as a precursor to CRM implementation
 - Implementation of integration between the public facing systems – i.e. Self and Connect, and Self and eNgage
 - Formal evaluation of the Firmstep CRM system (Achieve Service) as a potential affordable upgrade to Achieve Forms to provide a cost effective CRM system offering most of the benefits of the more costly systems in a timely and cost effective way.
- (2) That a decision is required on the number of users who will make use of the full CRM system (based upon the decisions taken about centralised or decentralised Contact Centres)
- (3) That there should be formal evaluation of the costs/benefits involved in each potential system integration should be carried out once a decision in principle has been reached about the potential use of the Firmstep CRM system.

Stream 1(b)

Centralised Reception in Civic Offices and Answering Enquiries at First Contact

Introduction / Background

1. History of the issue being reviewed

1.1 In September 2005 the Council received a report from the Cabinet on a report by Steria Limited on how the Council's customer services could be improved. This had followed on from a critical Audit Commission CPA inspection that sought improvement and implementation of the strategic aim of implementing a customer contact centre. The Council then Commissioned Foresight Consulting to develop a plan for the implementation of a Customer Services Transformation Programme (CSTP).

2. Statement of the problem

2.1 In 2005, the issues were:

- That up to 30% of telephone calls to the Council were not answered (at the time the Council were receiving 1.3 million calls a year);
- When calls were answered, customers were transferred from one department to another;
- That there were inconsistent phone answering standards and no customer service training.
- That five reception desks in the Civic Offices was too many and confusing and customers were passed from main reception to other parts of the building to their separate reception areas and that the majority of services should be provided in a single ground floor reception.
- That the opening hours were not designed around customer needs in particular with respect to telephone enquiries

2.2 In 2015 the situation has changed somewhat but issues still exist around answering of enquiries at first point of contact, having too many reception areas and times when call answering performance has been an issue. The envisaged demand for longer opening hours, has not materialised.

2.3 Since that first report there have been changes to customer delivery:

- Internet improvements and its availability on mobile devices have meant that there has been a move to deliver more services online.
- A revamp of the website in the last five years has moved it towards being more transaction based.
- Mobile users are using different channels to contact the Council e.g. Social Media.
- The new telephone system means that traffic is now more measurable across services and improvements to initial call handling have lessened the pressure on main switchboard operators. Calls volume since 2005 has diminished.
- Some Directorates (Environmental Services, Resources, Council Tax, Housing Maintenance (Mears)) have introduced formal call centre arrangements and/or have defined customer services processes.
- The Council has introduced generic customer service training through its corporate offer

2.4 Improvements have been made to some of the Reception Points over the years. However the main reception desk is the original one which is some 25 years old and needs

replacement. Following improvements to staffing levels made in 2014, the desk now houses two full time members of staff and is cramped and not designed for its current use.

- 2.5 Housing reception areas are hidden from plain view, there is no queueing system, no parcel delivery area and there is a lack of useable counter space. It is a poor and uncomfortable customer environment with poor lighting and hard seating. There is a lack of access to online services, desk or table space.
- 2.6 Accessibility, although there have been some improvement is still poor, with no adaptation for desk access by wheelchair users or hearing loop. Interview rooms are small and cramped with limited access for wheelchair users and people with young children.
- 2.7 The Leadership Team have also identified problems with the reception area:
 - Lack of disabled access/counter access
 - Lack of privacy/space in interview rooms
 - Needs to be more welcoming
 - Queues/ needs a system
 - Having phones instead of personal contact
 - Receptions not easy to locate for visitors
 - No customer facilities for working on forms/help
 - Lack of staff security

Refurbishment of the area is required in any event.

3. Stream scope / assumptions or constraints imposed by team or members

3.1 Scope objectives:

To deliver a proposal for a centralised main reception for Epping and the Council; which:

- (i) Combines the current 5 receptions at the Civic Offices, and
- (ii) Delivers a front office / back office system to resolve a high level of enquiries at first contact.

- 3.2 It was agreed with the project sponsor at an early point that, at least initially, we should concentrate on a combined reception/front office proposal before we sought to replicate this type of service at town centre level.

4. Research and Analysis

4.1 In formulating the report we have used the following sources of information for research:

- CSTP Programme Plan (draft) 2006-2009
- Reports to Cabinet and Council July 2006
- Task and Finish Review October 2006
- Report to Cabinet on NW Maintenance HUB
- Report on Closure of Cash Office to Cabinet

4.2 Evidence was also gained from the following:

- Meeting with Housing Operations Managers 22 September 2015
- Consultation with Leadership Team – 23 September 2015 (see Appendix 7)
- Customer Insight Conference – 19 October 2015
- Visit to Chelmsford BC on 9 November 2015
- Visit to Contact Centre in Council Tax (11 November 2015)
- Visit to Neighbourhoods Contact Centre (23 November 2015)
- Meeting with Community Safety/Portfolio Holder and ETC re Policing Enquiries
- Meeting with C Askew (Service Desk Supervisor) – 17 December 2015

- Consultation with Cabinet Members at Away Day
- Feedback from a meeting with Cabinet and Management Board members
- Discussions with Facilities Management about alterations to the building
- Suggestions from senior staff on potential services to be provided.

5. What analysis didn't we achieve and how has this affected the project direction?

- 5.1 We have not had access to customer survey (face to face) data. The Working Party are split as to whether this should be undertaken as there are obvious cost implications and the group felt that it needed to be undertaken externally and timing was an issue. Traditionally the Council has not commissioned regular customer surveys, so a one off survey, whilst giving a base line position going forward, provides no trend data of where we have come from.
- 5.2 Our research meetings have brought forward anecdotal evidence from staff about where the issues are within the organisation but this is not evidenced by a (customer) third party survey. The Council now has the results of the Essex County Council Tracker Survey which informs us on overall levels of customer satisfaction with the Council. An extract from that survey is shown at Appendix 1. This shows us as having satisfaction levels of 51%. The Council is only 8% points behind the leading Essex Authority, an achievable target.
- 5.3 We do not have quantitative information on customer journeys. We do, however, have data relating to referrals from main reception which provides trend information about use of services over the last year. In some cases we have been able to establish that these referral levels do reflect accurately requests of services but in others we have not as no data is being routinely collected. In developing an effective reception solution user data must now be collected to establish service need.
- 5.4 Consequently, we do not have a costed proposal for the changes required to the main reception area. The approach to launch into a design phase straight away is not possible until firm decisions are made about the accommodation strategy, the services that are going to be provided centrally, whether the building as it is currently configured can be adapted to that use in a cost effective manner and whether the level of expected traffic can be accommodated in the space available.
- 5.5 We were asked to discuss with other agencies to gauge their level of interest in sharing services. A meeting with the Safer Greener Transport Portfolio Holder and officers from communities has been held to look at the potential of Police services being provided, At the time of finalising the report these discussion have not reached a conclusion and have therefore not formed part of the current recommendations. Likewise, as discussed above, the lack of good data on visitors makes it premature to raise the prospect of site sharing if this may result in capacity issues later. That is not to say that this cannot be revisited later in the process.

6. What data has been used?

- Attendance data collated by main reception on visitors for the last year
- Telephone system data on call abandonment and use of voicemail
- Returns of questionnaires sent to service managers in November 2015

6.1 We have had access to telephone call stats and volume/abandoned data for 2015. This is attached as Appendices 2-5.

6.2 We have customer journey data from main reception. Visitors to main reception are in the region of 100,000 a year currently. Emails to ContactUs are the second highest line of enquiry. This is attached as Appendix 6

7. How have we used this data to support our recommendations?

7.1 Telephone data from the Shoretel system has been received for October and November 2015. Details of this data are at Appendix 2 along with annualised monthly data for 2015. The data suggests a varied picture. In areas where there are formal arrangements, performance is very good. Examples being, the main switchboard and the two contacts centres. In Council Tax, the rate of abandoned calls is at 2% even at high call volumes. From discussions with that centre, abandoned calls are routinely followed up. Their Case Study is below.

Case Study: Council Tax Annual Billing

The Effectiveness and Efficiency of using Shoretel Call Centre Technology

Prior to 2015/16, the Council Tax team consisted of two sections, each with 3 phone lines, plus the two Team Leaders and Council Tax Manager; making a total of 9 lines available to take calls from customers at peak times. During annual billing this would normally result in the phones being busy for the whole week and had previously caused the council's phone system to crash.

Unfortunately, due to the lack of technology there were no accurate figures to confirm the number of phone calls coming into the section, the number of calls being answered and more importantly the number of abandoned calls; the result of customers being unable or unwilling to hold on long enough to get through to a member of the Council Tax team.

The introduction of the Shoretel phone system not only changed the way the Council Tax team worked, it also changed our thinking and tuned our focus to the requirements of the customer and the service we provided.

The Shoretel system was installed 3 months before the 2015/16 annual billing, which gave staff the time to understand how it worked, the management time to explore its' potential and time to train two "champions" to bridge the gap between the telecoms professionals and the staff.

The 2015/16 Council Tax bills "hit the mats" on the 16 and 17 March 2015, which resulted in 790 phone calls being taken on day one and 441 on day two and calls returning to somewhere near normal volumes by day three. This was the result of having a maximum of 17 lines open, a 90% increase on the previous year, and an average of 10 lines open at all times. This alone proved to be a massive increase in our customer service and resulted in far fewer disgruntled callers, but the euphoria was overshadowed by the disappointment of discovering there were 147 abandoned calls on the first day.

Straight away we sat down with our "champions" and the telecoms staff to analyse the

problem and find a workable solution. The first thing we needed was a breakdown of the facts and figures, which are shown below. We broke the day up into 30 minute intervals and then drilled down through the time periods to analyse the number of lost calls in each time period. The results showed that 116 of the 147 abandoned calls (around 80%) occurred between 12noon and 2pm, peaking between 12:30 and 1pm when 45 calls (31%) were lost.

The upshot of this will result in the Council Tax team taking staggered lunches over a 3 hour period 11:30am – 2:30pm during the peak times for this year’s annual billing, with additional resources being made available between 12:30 and 1pm. Furthermore, we have developed the ability to run an “abandoned calls” report every 15 minutes throughout the peak times, which will display the phone numbers of those customers unable to get through to an adviser and give us the unique opportunity of calling them back.

That is customer service!

RG4.2 Group Abandoned Calls Analysis By Date

Date From :	16/03/2015	Date To :	17/03/2015
Time From :	9:00am	Time To :	5:15pm
Group Name :	CTAX, CTAX 2nd Line		
Requested By :	4191		

Date	ACD calls accepted	ACD calls abandoned	ACD calls abandoned in the 1st STI	ACD calls abandoned in the 2nd STI	ACD calls abandoned in the 3rd STI	ACD calls abandoned in the 4th STI	ACD calls abandoned in the 5th STI	ACD calls abandoned in the 6th STI
<u>Group Name</u>	CTAX							
16/03/2015	790	140	6	6	6	7	6	109
17/03/2015	441	7	4	0	0	0	1	2
Group Total	1231	147	10	6	6	7	7	111
Total:	1231	147	10	6	6	7	7	111

7.2 However, there are areas where statistics indicate that customers are not being able to contact us effectively. There are areas that, from the data, abandoned or voicemail calls make up between 20-50 percent of the overall traffic.

7.3 Overall, abandoned call rates range between 12.41% (May) and 5.73% (Oct). The peak in May is thought to be directly related to problems with the waste contract. Data shows that from the estimate made in 2006, which was 1.3 million calls a year, telephone traffic is in the range 38,000 – 28,000 calls per month through call centres and workgroups. These numbers would make up the bulk of customer telephone contact. This equates to around 400,000 calls a year, a third of the traffic stated in 2006.

Case Study: Neighbourhoods Contact Centre

This contact centre has been evolved over a number of years, and consists of 8 members of staff, with a mixture of full and part time staff dealing with all types of contacts into the Directorate. It is the first point of contact for almost all of the services covered by Neighbourhoods, with those that are not currently covered due to the

restructure, planned to come on line later.

All complaints and requests for information are logged using the M3 system, whether these are by letter, telephone, or email. The centre gives advice and guidance predominantly on waste & recycling calls, which can range from collection advice through to policy matters. It also deals with more technical aspects such as Abandoned Vehicles, Environmental Health, and Neighbourhoods enforcement issues, for example Noise nuisance, and bonfires; drainage and flooding, and fly tipping incidents.

It processes and gives advice on applications for special collections, assisted and medical collections, additional and larger bins, requests for smaller bins, and takes payments for some of these but also fixed penalty notices, food and hygiene courses, and abandoned vehicles.

A central contact number for the directorate was introduced approx. 7 years ago to avoid residents having to search for the right person to contact, and to ensure that calls were answered by a person rather than leaving a message on an answerphone. This has proved very successful and allows officers the time to concentrate on their main duties, and to deal with the more technical aspects of their jobs.

We also introduced a central email account where all emails, and achieve website forms are channelled through. This ensures that the account is continuously monitored throughout the day and where necessary emails can be forwarded to an alternative officer, where the original intended contact may be away from the office for some time.

These actions were taken to enable the customer to have a better experience when contacting the department, to ensure that their concerns are dealt with at the first point of contact wherever possible, and to avoid them having to be passed around from pillar to post. With the introduction of these two channel shifts it has meant the types of calls can be assessed, the number of callers trying to contact the directorate can be monitored and more lines opened up where necessary resulting in a shorter waiting time for the customer, all of which was previously unknown.

With the recent change in the waste collection services from five days to four days, we experienced a huge increase in telephone calls, with over 750 calls a day coming into the centre at its peak. This resulted in every phone within the section being opened up, and staff drafted in to help cover this surge. We could clearly see how many people were in the queue at any point in time, and the staff coming in to cover the phones were fully briefed on what information could be given out.

Because all emails came into a central account this meant that, an initial acknowledgement response could be given to all contacts providing them with information on any delays caused due to the huge increase in contacts, but also staff from other directorates could come in to help answer queries and therefore resulted in an improved response rate.

Over the period of 11 May 2015 – 25th October (peak period for the change in waste service) the contact centre dealt with 6012 calls and 4600 emails. These figures would not have been known without this shift to more centralised accounts. We are planning to bring on line those services that are new into the Directorate, and to provide training for the team to enable them to deal with these new enquiries.

- 7.4 There is no doubt that telephone contact performance would be improved if all directorates had access to call centre methods and resources. It was certainly expressed to the report author that senior officers dealing with routine contacts within the Council are, at times, inundated with telephone calls. Analysis of the data reveals that call abandonment would fall

to less than 3% if calls from only those with the highest rates of missed calls were dealt with through to a call centre.

7.5 The decision that needs to be made is that of the model the Council wishes to pursue. The current model has only two formal contact centres. One is revenue generating (Council Tax). This is discussed more fully below.

7.6 The best visitor data we have is that obtained via main reception (Appendix 6). Figures from visitor data collected over the last year show the following top requests for services:

1. Recycling Sacks
2. Contact Us (via email)
3. Housing Options
4. Housing Management
5. Planning Applications/Enquiries
6. Council Tax
7. Environmental Health
8. Housing Benefits
9. Essex County Council
10. Licensing

Case Study: Recycling Sacks

In addition to household deliveries of clear recycling sacks, Epping Forest offer free rolls of bags through outlets within the district.

Statistics from main reception show that the most popular enquiry from visitors is for bags. During their visit in the last year 40,000 people asked for bags.

Data from Neighbourhoods Contact Centre shows the delivery of batches of sacks to main reception were:

	No of bags
3 occasions of 10 boxes being delivered	12,000
1 occasion of 60 boxes being delivered	24,000
3 occasions of 25 boxes being delivered	30,000
47 occasions of 20 boxes being delivered	376,000
Totals 14/12/14 – 14/12/15	442,000

This is an additional roll of bags per household per annum. The Working Group feel that the Director of Neighbourhoods should consider if there is a better way of distributing or phasing out the bags. It is understood that a million bags per annum are being sought each year across all outlets. If residents are only coming to the building for bags then a huge number of residents are being inconvenienced by an unnecessary journey into Epping.

7.7 If you set aside the trips made for recycling sacks and online approaches that make up our top two highest contact figure (40,300 and 8550 respectively), the next highest contact is Housing Options. Their data has been cross checked with manual data held by Communities of public visits.

Visitor Data from Housing Options:

Nature of enquiry	Waiting list	Homeless/Homeless Prevention	Housing Management/ Housing Benefit Enquiries
Enquiries Total (monthly)	375	36	132
Annualised	4,500	432	1,584

- 7.8 During any month Housing Options deals with a high volume of enquiries through the Housing Options desk. It would not be uncommon for the Housing Options service to deal with 6500 enquiries through their reception desk on an annual basis. The Service also takes approximately 1,000 calls a month.
- 7.9 Housing Management deal with 3,200 visitors a year. This service has no front facing counter arrangements and sees visitors that present themselves at main reception. The reception staff takes their address and Housing staff then come out to see them as necessary in one of the existing interview rooms.
- 7.10 Planning Reception is located on the second floor. Visitors to that reception desk are directed to use stairs or lift. The desk is now only open to callers during the period 9 am – 1pm. During the mornings a duty planner is available to callers and on the phone. Building Control, Licensing, Personal Land Charges Searches and Forward Planning enquiries are also dealt with at this reception area. No formal visitor statistics are kept at this desk currently (and this would need to be done to establish a base line for user levels in advance of moving the service to the main reception and to inform the design). Main reception data would indicate that the total visitor traffic is in the 5,000 – 6,000 per annum ballpark.
- 7.11 Council Tax have their own counter within the Conder Building. This is shared with Benefits. Over the past 3 years Council Tax have averaged around 3,350 callers per year at that reception. Benefits do not keep visitor statistics but using the main reception data as an indication of caller traffic to that service, a similar level to Council tax (I.e. in the 3,000 – 4,000 visitors per annum bracket).
- 7.12 The Neighbourhood contacts centre will deal with members of public at main reception. It is a good example of where most people contact the Council using online or telephone methods although 2,000 people in the last year visited the main reception.
- 7.13 Survey data has been obtained from Service Managers about most requested services and this element is discussed within the Stream 2 report.
- 7.14 In summary, therefore, the main in person customer contacts will be (approximately):

Service	transactional visitors a year
Communities	11,500
Governance	8,900
Neighbourhoods	7,600
Resources	8,500 (not including cashiers payments)
Total	36,500

These figures are approximate (i.e. a smart guess based upon known data sets) and will be those that have visited to undertake a type of transaction rather than attending for meetings etc.

- 7.15 Cash Office transactions data was brought to members last year when they considered the closure of the cash desk and its replacement with Kiosks. A summary is below:

		Front Office				
Year	Volumes	Cash	Cheque	Debit Card	Credit Card	Total
2011-12	Number	14,886	13,688	4,564	78	33,216
	Value (£)	2,058,338	3,793,323	958,483	11,885	6,822,028
2012-13	Number	13,776	11,675	4,560	306	30,317
	Value (£)	1,921,545	3,710,918	973,821	49,243	6,655,527
2013-14	Number	16,712	11,187	5,159	386	33,444
	Value (£)	2,136,359	3,821,113	1,074,714	46,604	7,078,789
2014-15	Number	15,148	10,512	5,101	286	31,047
	Value (£)	2,059,349	3,345,753	1,081,731	34,928	6,521,761

This shows potential visitors as 31,000. However these figures are not visitor numbers. Further monitoring would be required to ascertain whether this transaction level related directly to visitor numbers.

7.16 Based on the offices being open for about 250 days per year, daily visitors could be in the region 150-250.

8. Where do the results of analysis take us? - Centralised Reception

- 8.1 Re-providing services in one location will only provide good value for money if there is demonstrable saving, a customer service need, or significantly more services are offered in one place. This means that services will need the space to operate effectively and sufficient to see the quantum of visitors expected across a broad spectrum of services.
- 8.2 It is also likely that there will be declining personal visitor numbers over time, and with the move towards online provision, the previously estimated reception size needs to be rethought. Nudging even 10% of these visitors to online services would save significant time and resources. Based on the existing seat provision, accessible counter seats positions need to be in the region of 4-6 (there are currently 5, 3 in CT/Bens, 1 in Planning, 1 in Housing) plus private interview spaces (5-6 rooms). However, this is not a true indication of need as officers from directorates also attend main reception to deal with visitors (for example – Elections).
- 8.3 In 2005 an indicative plan was drawn up showing similar levels of accommodation. This plan is shown at Appendix 8. However, the freeing up of accommodation next to the reception areas is dependent upon Housing Assets and Repairs staff moving to the new NW Maintenance HUB (which is currently not before end of 2017) and also subject to the St Johns Road development. These staff could be relocated before that date.
- 8.4 A detailed design should be drawn up by Facilities Management to give the Council options for the reception area and to show how much overspill space is required over and above the current main reception area to accommodate the additional staff.
- 8.5 Given the need for physical works, a phased plan of implementation will be required, this means a more organic approach to the centralisation of services would have less impact on

customer services. Working from a core of service to bring a wider range of user services etc over a defined time period.

9. Should there be a combined call centre?

9.1 Call performance has improved. This is through a number of factors that were flagged up in the 2005/6 Review. As stated above, where there are formalised arrangements, these work well, where there are not, it works less well.

9.2 If the decision is taken not to change call arrangements then the following needs to be addressed:

- How would existing call centres mutually support each other?
- What training would be required to do this?
- What CRM systems would be needed?
- How can we make our dealings with customers more effective?
- What do we do in services that have less well formed telephone answering? Planning, Housing? Areas where there is a high proportion of voicemail and abandoned calls?
- How do we deal with amount of abandoned calls at the main switchboard?
- Do we need to introduce formal phone standards?

9.3 If the decision is taken to centralise most call arrangements then the following need to be addressed:

- How much is it going to cost? A fully costed proposal is required.
- Are we going to locate it with the main reception? Or use overspill areas? Or other offices in the building (co-location is not absolutely necessary but may be desirable)
- What are the staffing implications?
- It needs a manager! And an organisational place.
- It needs Service buy in.
- Should we build upon the existing Neighbourhoods Contact Centre and grow it from there?
- What Technology do they need?
- What services are they going to provide?
- What core services do we start with?
- The Council needs to understand its Customers journey maps
- The Council will need to disaggregate CSO jobs from current back office support.
- Work to develop FAQ's is needed
- Closing of the switchboard

10. Conclusions

- (1) Good customer service exists here and needs to be replicated across the Council. There is obvious commitment by the staff I have met to providing good service to the residents of the district. The appetite for improvement and change does not seem limited at section level.
- (2) Telephone answering performance has improved considerably since 2005/6, with much lower levels of call abandonment, albeit with pockets of low performance. These may be restrained by organisational requirements.
- (3) The Council needs to understand the types and quantities of customers and the customers journeys. Further work is required to inform future service provision.
- (4) The centralisation of the main reception has been agreed by members on two separate occasions but never started. Does the Council have the appetite to achieve this

change? By closing other reception areas, particularly on the second floor, better use could be made of the accommodation.

- (5) The Council needs to decide whether it wishes to centralise its main call handling and if so, need to appoint a suitable officer to lead this change.
- (6) Multi-skilling of customer facing officers will be required for which training will form an important element and will have an organisational impact
- (7) Officers dealing with telephone or electronic enquiries do not need to be co-located with the main reception but it may be desirable.
- (8) A scalable response to peaks in enquiries is required in any event.
- (9) Communities staff will need to be relocated. The wish to deal with accommodation matters in a sequential way will hold back implementation until at least 2018.
- (10) Repairs to the atrium windows or their complete replacement are required, however this is a maintenance issue not a project cost and should be done anyway.
- (11) The Civic Offices atrium design and supporting walls limit adaptation; however a single reception with the potential for six private interview rooms could be designed and costed.
- (12) Centralised change needs project management and IT systems support.
- (13) The Director of Neighbourhoods should review the Council's position on making available recycling bags from this building free of charge.

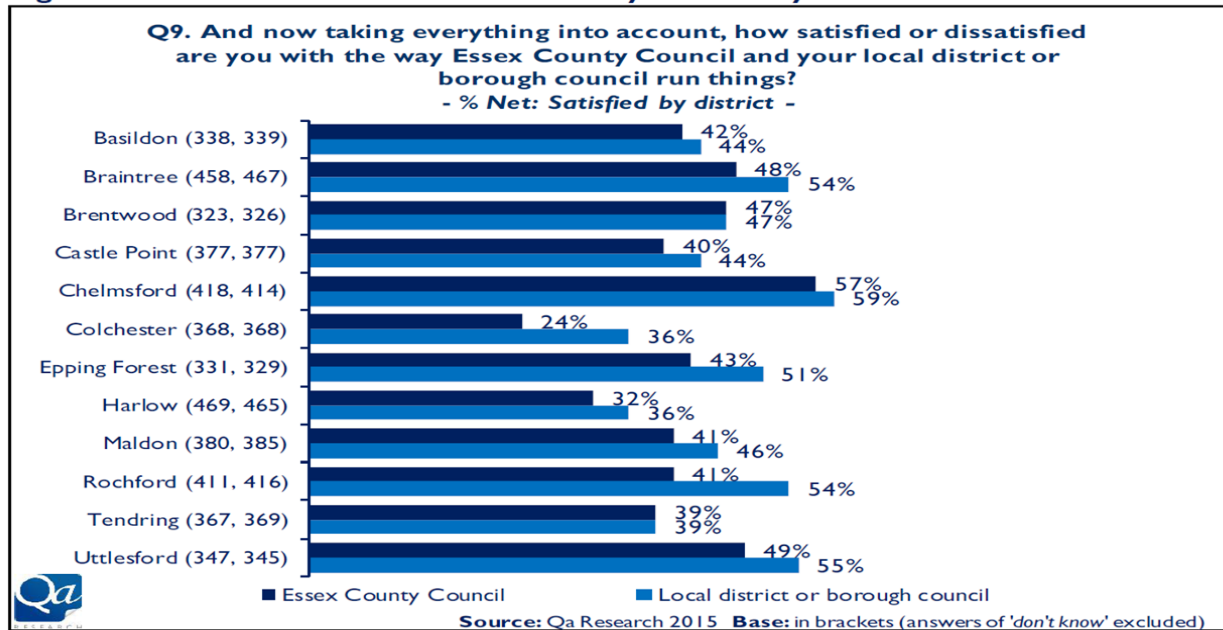
11. Recommendations

- (1) That Management Board and Members need to lead this project to move it forward.
- (2) That consistent visitor data recording should be undertaken by all reception areas and services routinely for a period of three months to provide a base line to inform the project.
- (3) That a decision be made to move to centralised or maintain a decentralised customer service team arrangement and then undertake the consequential recommendations.
- (4) If centralised:
 - (a) shut the switchboard and place a Customer Contact Centre (CSC) in between customers and officers to drive call traffic.
 - (b) Develop the current environmental services team as the hub of a main contact centre as a starting point.
 - (c) Appoint a Customer Services Manager to drive the process forward
 - (d) Develop a plan for the gradual movement of most enquiries to that team over time.
- (5) If decentralised:
 - (a) Formalise the processes that would allow call centres to provide mutual support.
 - (b) Deal specifically with those service areas where call answering is poor;
 - (c) Develop a programme of staff training based upon specific support needs and systems;
 - (d) A CRM is still going to be required
 - (e) Look at how the switchboard operators can be assisted during peak times.
- (6) That a single central reception has support and is required if front line customer service is to remain in Epping and reception services are to be co-located;
- (7) That the programme should not wait for an accommodation strategy during the overall transformation programme thus treating it as an exception or starting point.
- (8) That Facilities Management be requested to draw up a feasibility design based on the requirements set out in this report.
- (9) That further 'open' counter space is needed and should be taken into account in the design.
- (10) That Director of Neighbourhoods consider how recycling bag distribution can be improved so that residents do not need to attend these offices to collect bags.

Appendix 1 - ECC Tracker 16 Net Satisfaction Levels

October 2015

Figure 26. Satisfaction with local and county councils by district



Appendix 2 - November 2015 – Workgroup and Contact Centres call data

Workgroup names	Abandoned	Handled by WG Voicemail	Total calls	% Abandoned	% Voicemail
Glen Chipp (x4758)	0	1	6	0	17
CE	0	1	6	0	17
Alan Hall (X4004)	0	7	32	0	22
Communities Arts Development (X2802)	3	0	9	33	0
Communities Booking Line (X2983)	1	0	25	4	0
Communities Booking Line (X4226)	0	0	38	0	0
Communities Finance	0	0	26	0	0
Communities information and tenant involvement (X4041)	0	0	1	0	0
Community Safety Team (x2736)	0	7	20	0	35
Home Ownership Team (x4428)	4	17	153	3	11
Housing Allocations (x4716)	67	0	1006	7	0
Housing Assets (x2727)	1	49	255	0	19
Housing CARE Agency (x4086)	23	31	157	15	20
Housing Grants (x2728)	0	3	5	0	60
Housing Homelessness Assessment (x4027)	4	0	149	3	0
Housing Income (x2123)	3	8	19	16	42
Housing IT (x4324)	0	0	0	0	0!
Housing Maintenance x4199(x1988)	250	0	1862	13	0
Housing Management North (x4545)	32	39	1107	3	4
Housing Management South (x2726)	23	11	389	6	3
Housing Prevention (x4165)	46	0	945	5	0
Limes Centre Housing staff (x2826)	0	1	2	0	50
Private Sector Housing (x4348)	2	41	110	2	37
Sheltered Housing (x4368)	7	86	179	4	48
Waltham Abbey Museum (x4992)	8	9	29	28	31
TOTAL FOR COMMUNITIES	474	309	6518	7	5
Admin Registration Team (x4584)	99	96	929	11	10

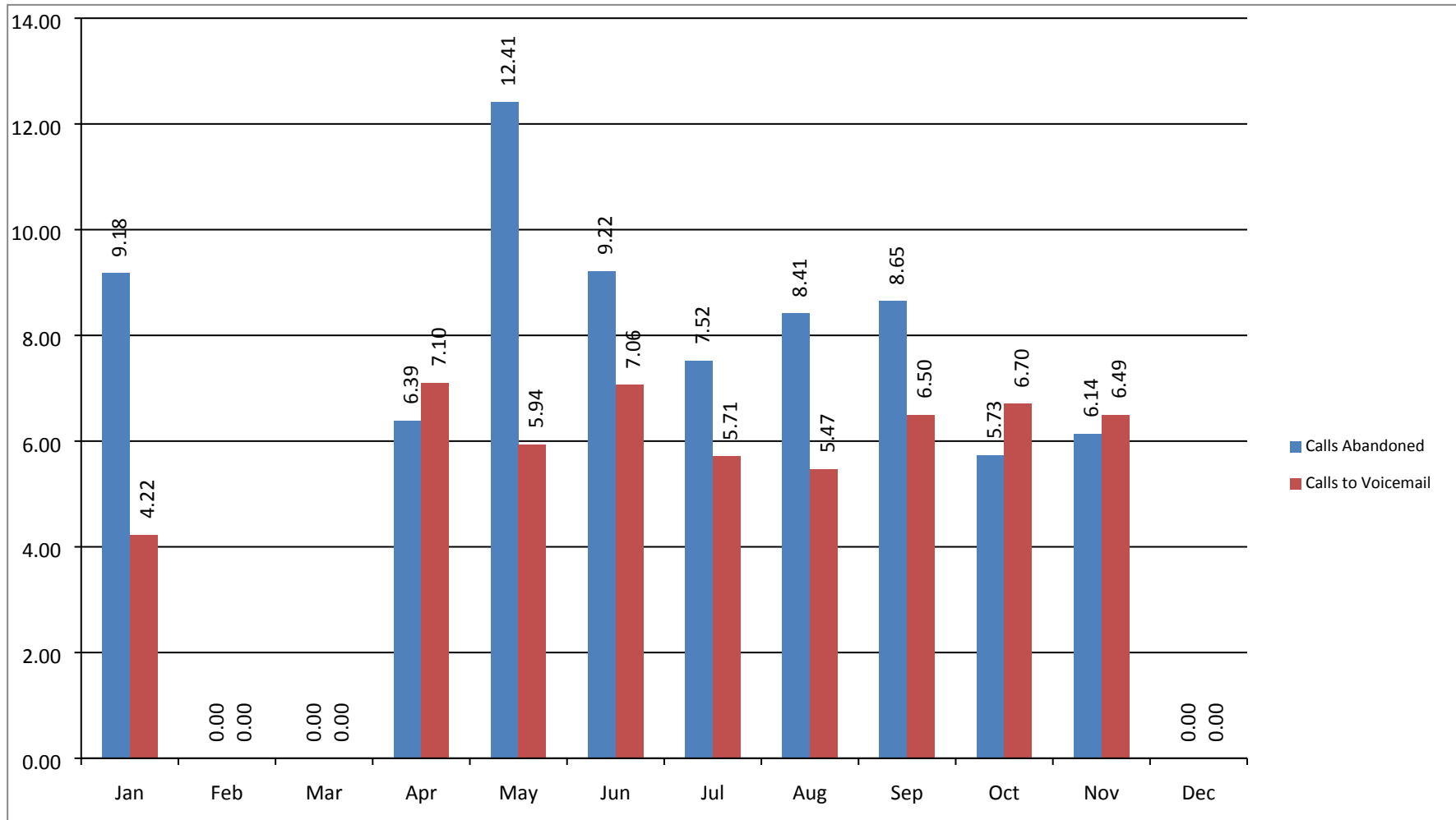
Workgroup names	Abandoned	Handled by WG Voicemail	Total calls	% Abandoned	% Voicemail
Building Control Surveyors (x4286)	12	0	138	9	0
Civic Reception Info Desk (x2500)	1	0	65	2	0
Civic Reception Info Desk (x4288)	0	0	63	0	0
Democratic Services (x4243)	3	0	76	4	0
Fraud Hotline (x4444)	5	11	32	16	34
Legal Admin x2052	0	0	1	0	0
Legal Debt Recovery (x2125)	0	0	0	0	0
Legal Contracts (x2124)	0	0	0	0	0
Local Land Charges (x2739)	5	1	180	3	1
Planning Building Control (x2047)	48	345	809	6	43
Planning Enforcement Team (x2800)	0	1	3	0	33
Planning Policy Hotline (x4517)	3	1	35	9	3
Planning Reception (x2792)	3	106	242	1	44
Public Relations (x4140)	7	0	27	26	0
Tom Carne (x4039)	0	0	32	0	0
TOTAL FOR GOVERNANCE	186	561	2632	7	21
Emergency Planning	0	0	0	0	0
Derek Macnab (x4050)	2	12	44	5	27
Engineering, Drainage & Water x2967	0	0	0	0	0
Enviro & Neighbourhoods x2968	0	1	2	0	50
Grounds Maintenance Technical Officers (x4562)	2	8	104	2	8
Licensing (x4721)	2	16	162	1	10
Neighbourhoods Parks (x2720)	0	2	2	0	100
Neighbourhoods Waste (x2721)	0	0	0	0	0
North Weald Gate House (x4200)	105	0	479	22	0
Public Health (x2969)	0	0	0	0	0
Public Health (x4348)	2	41	110	2	37
Recycling Sacks (x4385)	0	0	0	0	0
Trees and Landscapes Team (x2814)	17	23	89	19	26
CONTACT CENTRE	196	3	3269	6	0
TOTAL FOR NEIGHBOURHOODS	326	106	4261	8	2

Workgroup names	Abandoned	Handled by WG Voicemail	Total calls	% Abandoned	% Voicemail
Benefits V-M (X3571)	0	38	38	0	100
Benefits A-L (X2081)	48	4	732	7	1
Benefits M-Z (X2082)	34	3	554	6	1
Business Process (X4029)	2	0	8	25	0
Cash Office (X4258)	10	72	110	9	65
Cash Office (X4349)	113	690	994	11	69
Council Tax Business rates 4064 (X1305)	1	0	177	1	0
Council Tax Recovery 4030 (X1300)	3	0	315	1	0
David Newton (x4580)	0	32	59	0	54
Facilities Management (x4760)	1	0	8	13	0
Helpdesk 4888 (x1310)	19	0	94	20	0
HR Recruitment Line (x4433)	0	0	0	0	0
Postroom x2156	0	0	0	0	0
Print - Reprographics (x4388)	2	4	60	3	7
Superintendents (x4619)	8	6	39	21	15
Switchboard (x2000)	436	0	8028	5	0
Switchboard Back Up (x6000)	0	0	0	0	0
Bob Palmer (x4279)	0	8	21	0	38
CONTACT CENTRE	70	0	3592	2	0
TOTAL FOR RESOURCES	747	857	14829	5	6
Overall Total	1733	1834	28246	6	6

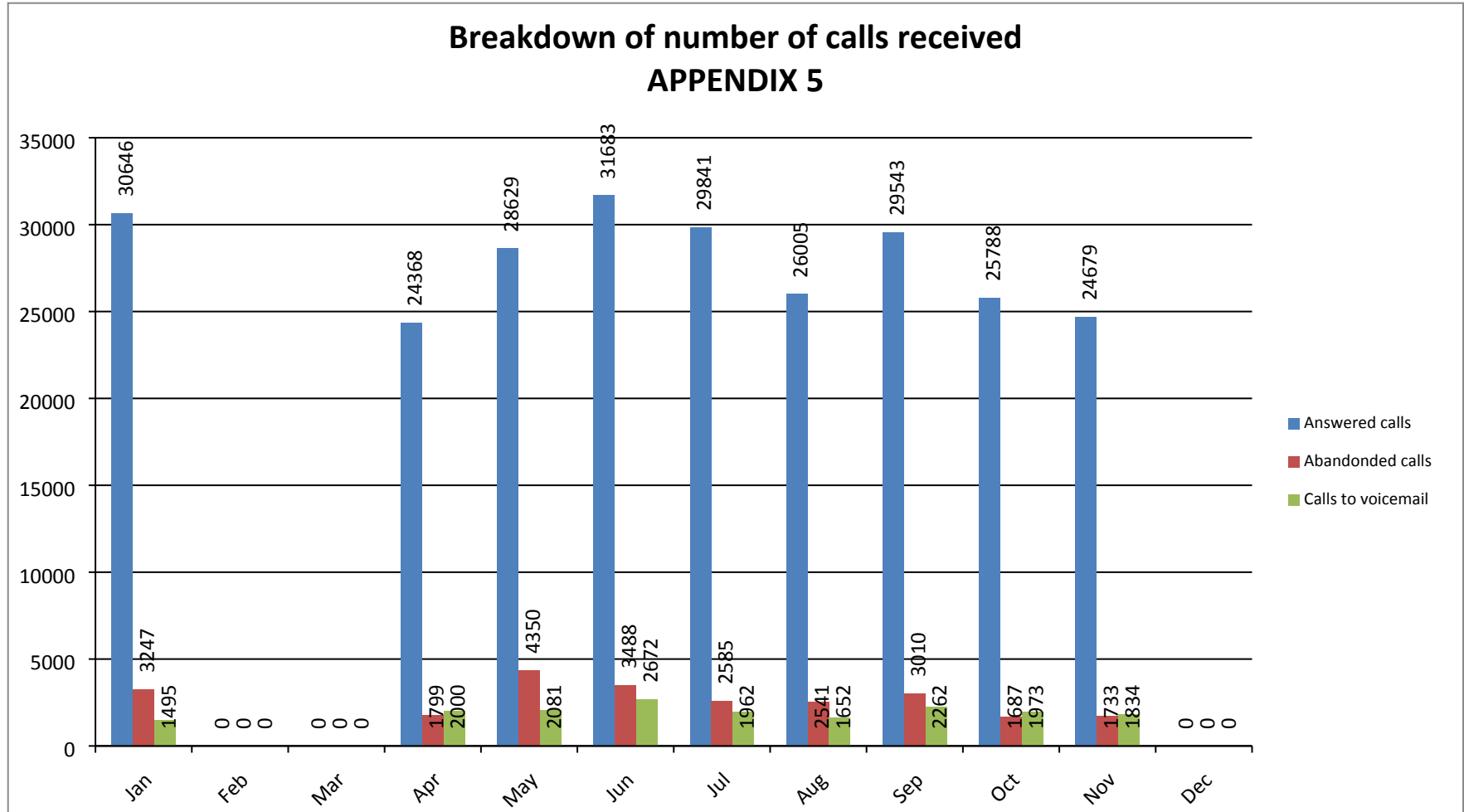
Appendix 3 – Telephone Call Annualised Data:

	Telephone statistics											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
CC												
Calls Accepted	6441											
Call Abandoned	375											
Combined												
Calls Abandoned	2872			1799	4350	3488	2585	2541	3010	1687	1733	
Calls to Voicemail	1495			2000	2081	2672	1962	1652	2262	1973	1834	
Calls Accepted	28947			28167	35060	37843	34388	30198	34815	29448	28246	
Totals												
Calls Accepted	35388	0	0	28167	35060	37843	34388	30198	34815	29448	28246	0
Calls Abandoned	3247	0	0	1799	4350	3488	2585	2541	3010	1687	1733	0
Calls to Voicemail	1495	0	0	2000	2081	2672	1962	1652	2262	1973	1834	0
%												
Graph Data	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Calls Abandoned	9.18	0	0	6.39	12.41	9.22	7.52	8.41	8.65	5.73	6.14	#DIV/0!
Calls to Voicemail	4.22	0	0	7.10	5.94	7.06	5.71	5.47	6.50	6.70	6.49	#DIV/0!
Graph Data	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Answered calls	30646	0	0	24368	28629	31683	29841	26005	29543	25788	24679	0
Abandoned calls	3247	0	0	1799	4350	3488	2585	2541	3010	1687	1733	0
Calls to voicemail	1495	0	0	2000	2081	2672	1962	1652	2262	1973	1834	0

Appendix 4 – Abandoned and Voicemail Call data



Appendix 5 – Call Received by month



Appendix 6 - Visitor Statistics:

Main Reception, Epping

Annual Totals Breakdown

Date:	Total		Total
1. Recycling Sacks	40359	Planning & Economic Development	
2. Contact Us	8550	31. Building Control	1206
Office of the Chief Exec		32. Economic Development	216
3. Audit	71	33. Forward Planning	532
4. Chief Exec	574	34. Planning Applications/Enquiries	2868
5. Committee/Councillors	580	35. Conservation	113
6. Elections	1476	36. Countrycare/TPO	147
7. Policy & Research	36	37. Meeting	1064
Deputy Chief Exec		Finance & ICT	
8. Arts	153	38. Bus Enquiries	1134
9. Museum	408	39. Train Passes	944
10. Sports Development	253	40. Cashiers	1216
11. Community & Young People	151	41. Council Tax	2136
Corporate Support		42. Housing Benefits	1936
12. Room Bookings/Supers	569	43. Finance & ICT	168
13. Building Services	713	44. Business Rates	141
14. Emergency Planning	183	Housing	
15. Estates	318	45. Care	245
16. HR	621	46. Council House Sales	499
17. Land Charges	272	47. Garages	848
18. Legal & Admin	671	48. Grants/Care & Repair	420
19. Licensing	1570	49. Housing Maintenance	1069
20. Print	219	50. Housing Management	3223
Environment & Street Scene		51. Housing Options	6124
21. Animal Welfare	139	52. Housing Meeting	644
22. Car Parking	848	53. Private Housing	132
23. Environmental Health	2019	Misc	
24. Grounds Maintenance	97	54. Voluntary Action	765
25. North Weald Airfield	231	55. Essex County Council	1611
26. Refuse Collection	996	56. Citizens Advice Bureau	295
27. Special Collection	448	57. Town/Parish Councils	811
28. Safer Communities	857	58. Reception	10697
29. SLM Contracts/Sports/Leisure	18		
30. Watercourses/sewers/drainage	54	Total Enquiries	104658

Appendix 7 - Consultation with the Leadership Team:

Notes from Leadership Team Consultations 23 September 2015

Scope 1(b) Centralised reception in Civic Offices
(Scope linked to 1a Centralised reception in town centres)

Scope objectives:

- (i) To deliver a proposal for a centralised main reception for Epping and the Council; which
- (ii) combines the current 5 receptions at the Civic Offices, and
- (iii) delivers a front office / back office system to resolve a high level of enquiries at first contact.

Questions Posed:

Centralised Reception:

What issues are there in bringing together the current reception areas: (be as specific and honest as possible)

- Lack of accommodation/design of the area
- Staff training/skills
- Officers being required to attend reception
- Costs of works and staff responsibilities
- Technology to enable services to be provided
- Staff resistance
- Taking payments/secure cash handling
- Lack of private reception areas
- Could we use Homefield House/demolish and create centre?

What problems are there with the current reception area?

- Lack of disabled access/counter access
- Lack of privacy/space interview rooms
- Needs to be more welcoming
- Queues/ needs a system
- Having phones instead of personal contact
- Receptions not easy to locate for visitors
- No customer facilities for working on forms/help
- Lack of staff security

What barriers are there to implementation?

- Cost
- Members
- Building (design)
- Staffing fears
- Incremental approach or big bang?
- Being joined up with other initiatives in service plans

Who should we looking to regarding shared services?

- Police – currently looking at closing Epping – non uniformed presence/PCSO base?
- DWP – Seeking delivery of universal credit/advice for online applications/personal budgeting advice/job advice and services
- VAEF/CAB
- ECC social care – community services (older people)
- Epping Town Council
- Registry Office
- COSTA
- Parking Partnership

Resolving enquiries on first contact:

What types of common enquiry could be dealt with centrally?

- Most first line enquiries
- Waste calls
- On lines forms
- Housing sign ups/keys pick ups/ basic tasks/ Housing list enquiries
- Advice of upcoming leisure activities/booking
- Viewing of plans/general planning enquiries
- Taking in information for services/ document scanning and letters
- Registration help/form completion
- Information on financial positions/payments/Fees
- Tell us once
- Centralised contact emails
- Some admin tasks (to be agreed)

What type of contact could only be dealt with within directorates?

- Case specific enquiries/complicated or detailed matters
- Tenancy enforcement
- When the Council has prompted a response
- Complaints where they cannot be easily resolved
- Interviews
- Technical enquiries

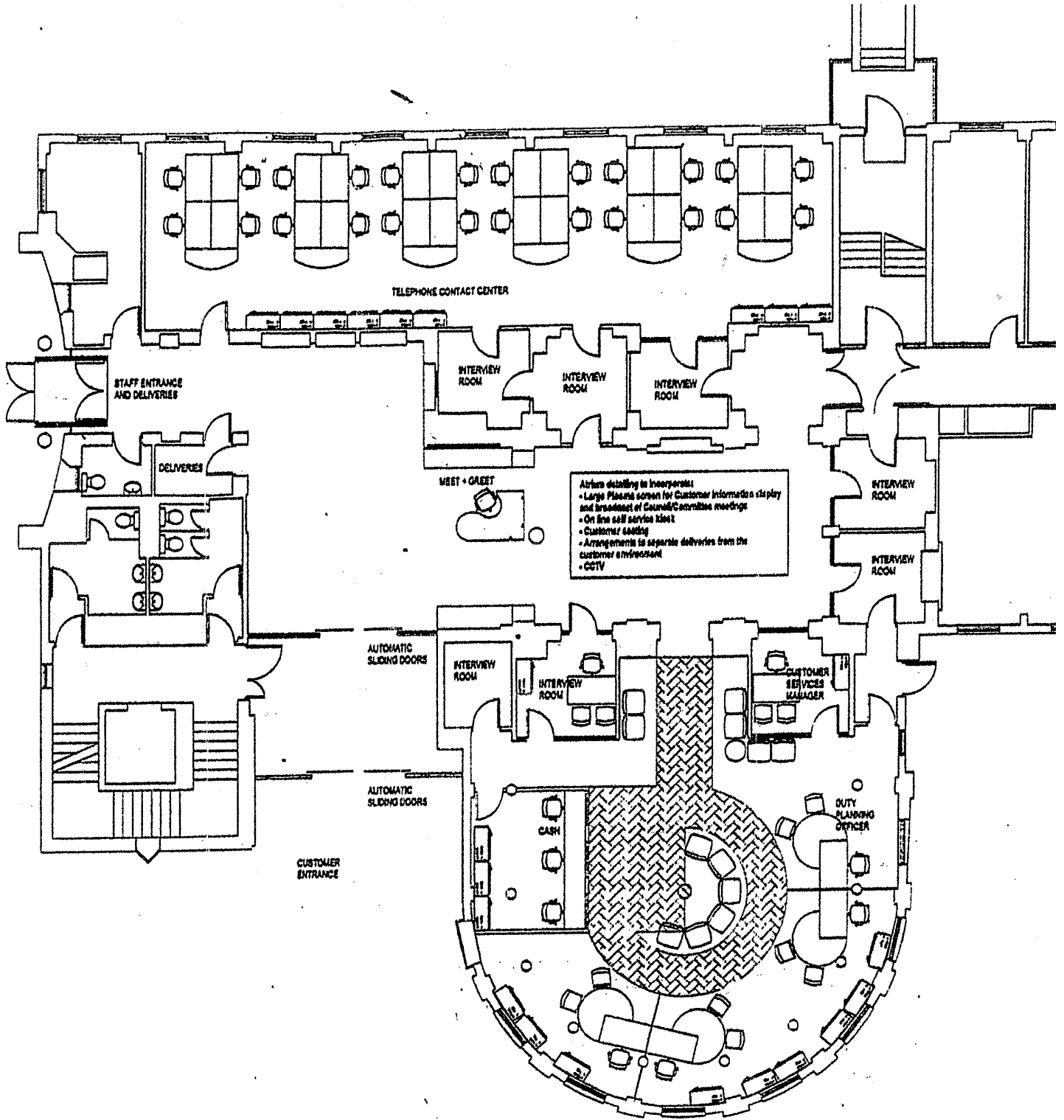
What 'contact centres' do we have already?

- Leisure enquiries/bookings/payments by cheque and card
- Benefits (by assistants on a rota – maybe changes going forward)
- Council tax
- Planning and licensing and duty planner
- Broadway office (Housing only)
- Limes Centre
- Housing options
- Environmental services

Who should the group speak to?

- External partners
- Planning (Peter Millward)
- Ian Willis for Revs and Bens
- James Carstairs – Leisure
- Roger – Housing
- Environmental? Julie

Appendix 8 - 2005 Proposed Customer Services Solution



Stream 2

Channel Shift

Introduction / Background

1. History of the issue being reviewed

- 1.1 Channel Shift is the evolution of an organisation's methods of service provision and delivery. It is directed in part by the platforms of service delivery chosen by the customer/client as well as the preferences of the organisation. It can also be dictated to a large extent by workflow processes.
- 1.2 The development of electronic, online and digital communications systems has produced an increasingly diverse range of potential systems. However, progress towards channel shift can also be influenced to a large degree by historical processes and procedures. Ingrained paper-based working practises adapted to online communications rarely deliver the full potential of channel shift. Channel shift includes tools to allow out of office and mobile working as well as office-based automation reducing staff time and eliminating paper. To maximise the benefits of channel shift often requires a root and branch reappraisal of an entire workflow process.
- 1.3 The motivations for channel shift vary. For some organisations, it has been a matter of necessity to reduce costs and streamline services. For others it has been a matter of customer service improvement, sometimes driven by the organisation and sometimes by the customer. In some cases channel shift has been driven from the bottom up by staff innovation as newer and better working methods and processes have become available.
- 1.4 'Big Bang' implementation, and gradual/incremental approaches to channel shift each have merit and have been adopted by organisations.
- 1.5 Epping Forest District Council has been effectively practising a process of incremental channel shift since the 1990s. The development of ever more sophisticated IT systems has led to significant advances in back office work processes. Similarly, the Council's front office communications systems have evolved as our customers and partners make increasing use of digital forms of communication.
- 1.6 The introduction of the Council's first online tools in the early 1990s featured basic email and crude information-orientated websites. The focus today has evolved into far more interactive two-way communications. The high historic cost of strategic ICT CMS has inhibited the implementation of council –wide systems. The integration of front-end communications with back office systems has therefore been piecemeal and primarily driven at a departmental rather than a corporate level.

2. Statement of the problem we are trying to address

- 2.1 To achieve the full potential of channel shift including improvements to customer services, streamlining of services and reductions in cost requires a corporate approach with a root and branch review of workflow practices – also known as business process mapping.
- 2.2 The challenge is to achieve channel shift in a corporate manner, thus providing:
 - An enhanced customer experience
 - A more efficient workflow process
 - A rewarding working environment
 - Reductions in costs and best value for money

2.3 Previous attempts by other councils to develop integrated digital back office and front end systems have proved very expensive. Commonly, the aspirations have not met the reality of IT systems. Similar proposals have previously been assessed and rejected by Epping Forest District Council as too expensive and disruptive. The challenge therefore also involves the development of affordable and deliverable strategies over a given timeframe.

3. Stream Scope / assumptions or constraints imposed by team or members

3.1 The Channel Shift team made assumptions that Members wish to see evolution towards digital automation of services, the primary driver for change being improvements to the customer experience and accessibility to services. Reductions in the cost of delivery are seen as a secondary, although an important additional driver of channel shift. The team also took account of the wish of Members to retain the best elements of current practice including the ability for customers to retain face to face and telephone contact with the Council.

3.2 Constraints include implementation cost, staff resources, expertise and organisational culture. Preliminary research into current channels was restricted. Whereas some service areas such as the current Information Desk, Neighbourhoods Contact Centre and Revenues Contact Centre have access to detailed customer contact information, customer contact statistics are not routinely held within many other service areas. Telephone traffic and website statistics can provide some additional information but there is a lack of in-depth knowledge around current customer contact. An initial survey of managers at section level (circulated via Assistant Directors) did not provide hoped for returns and further investigation would be required.

4. Research and Analysis

4.1 Desktop Research - A great deal of online information is available. The Government programme of Digital by Default has identified the considerable potential cost savings as well as improvements to customer experience achievable through channel shift. Research by SocITM (the Society of IT Managers) has placed average costs estimates against various communications channels to demonstrate the significant costs reductions available. A number of private sector companies and consultancies also offer online research and survey results demonstrating the potential advantages of channel shift.

4.2 The latest survey published by Goss suggests the average cost of a face to face transaction in 2015 was £8.62. Telephone interactions typically cost in the region of £2.83 while online transaction cost around 15p.

4.3 Site Visits - Members of the team attended a meeting with Chelmsford City Council as part of the research process. Similarities of aspiration and approach were identified, with insight into the original use of light-touch technology integration compared with full service CRM/CMS systems now planned, staff transfers and changes to working practices. Management of the transformation process and lessons learnt by Chelmsford provided a very useful background context.

4.4 Internal Survey - A combined internal survey circulated to Epping Forest District Council managers during November 2015 sought information on all three work streams – Channel Shift, CRM/CMS integration options and Contact Centre.

4.5 The survey attempted to identify the types of channels already in use and where channel shift might provide the biggest impact. Responses were received from the following service areas:

- Benefits
- Housing Management North
- Planning Policy

- Internal Audit and Fraud
- Planning Governance
- Business Support and Process
- PR and Information
- Private Sector Housing
- Neighbourhoods Technical
- Health & Safety - HR
- Housing Management South
- Revenue Payments
- Learning/Dev - HR
- Legal Property and Planning
- Land Charges
- Culture
- Housing Assets
- Neighbourhoods Contact Centre
- Legal Land Charges & Complaints

4.6 Levels of response data varied with account also to be taken of differing levels and types of internal and external customer interaction. However, as a snapshot of some of the Council's key service areas, the research shows predominately that telephone, email, paper-based correspondence and face to face contacts remain the primary means of contact. With face to face already demonstrated to be the most expensive form of interaction, a shift to more cost effective alternatives would seem to be desirable.

4.7 While more cost effective forms of communication such as Web Forms, CRM/CMS and Social Media penetration is still relatively light, information returned from services areas suggest that these alternatives are to some extent already available and could be used more extensively.

4.8 Channel usage to a greater or lesser extent between the 19 responding service areas is as follows:

• Email	19
• Phone	19
• Letters	15
• Face to Face	15
• Web Forms	11
• Web CRM/CMS	10
• Print	9
• Social Media	7
• Intranet	6
• Other	4

4.9 The results suggest that while phone and email channels are firmly ingrained in council working practices, the most expensive and labour intensive channels – letters and face to face contact are a major focus of service delivery. However, the survey also shows that service areas are already adapting to new platforms such as Customer Relationship Management and Content Management Systems, Web Forms and Social Media. While this may have been achieved on a piecemeal basis to date, it should be possible to encourage greater use of these channels where they already exist and extend the use of these channels where they are currently not used.

4.10 Data from the internal survey is incomplete. Further in-depth research would be required to produce a comprehensive picture. However, the data is sufficiently robust to provide a signpost to the current position and the direction in which the Council might move.

5. Conclusions

- 5.1 Research and analysis suggests that customer expectations are changing. Remote online access is increasingly replacing face to face, paper and phone as preferred methods of contact. Service sector organisations (public and private) are at the same time identifying cost savings in channel shift to online and increasingly automated platforms. Channel shift aids productivity. New methods of working (such as mobile) have the potential to improve the working environment of staff as well as delivery of services to customers.
- 5.2 Channel shift combined with greater automated integration of IT applications has been shown to improve customer services and reduce inefficiency. However, further cost/benefit analysis needs to be undertaken to establish the appropriate levels of IT investment from light-touch web-based forms to fully integrated CRM/CMS. Economies of scale are important. High levels of investment will typically produce the best return on those areas of high customer volumes or interactions. The selection of appropriate channels should be prioritised within the context of the IT investment strategy.
- 5.3 Any assessment of resources should also account for staff. Business mapping is likely to generate new working practices leading to restructuring within service areas and reviews to current job descriptions. Reallocation of staff with appropriate training and development is essential for successful channel shift implementation.

6. Channel Shift Conclusions and Recommendations

- (1) Adoption of the principle of Channel Shift to meet and reflect evolving customer service requirements.
- (2) Subject to 1 (above), to conduct further analysis of current channels available to service areas.
- (3) Business process mapping to establish where changes to processes and procedures can be developed in conjunction with channel shift.
- (4) Identification of priority areas (ie those areas where the greatest impact can be achieved most rapidly in the most cost efficient manner).
- (5) Prioritise and implement channel shift in areas identified in 4 above.

7. Further analysis - Work for the Transformation Programme

- 7.1 As outlined above, greater understanding is required of current work processes, procedures and volumes at service section level. Members need to balance service aspirations against cost implications for a Low-Tax Local Authority. Current customer experience and satisfaction levels need to be tested and benchmarked with further research to establish future requirements balanced between customer demands and customer needs.

Top 50 Website Transactions

Period: 01/01/2015 - 18/12/2015
 A page view is a count of how many times a page has been viewed on a website or the chosen group within the chosen period of time. All page views are counted no matter how many times a user has visited the website in the chosen period of time.
 A visit is defined as a series of page requests from the same uniquely identified visitor with a time of no more than 30 minutes between each page request.
 (Definitions – Siteimprove)

	Page Title	Page Views	% of Total	Visits	% of Total
1	Results - Planning http://planpub.eppingforestdc.gov.uk/NIM.websearch/Results.aspx	581485	17.59%	81445	10.87%
2	Online Standard Details - Planning http://plan1.eppingforestdc.gov.uk/Northgate/PlanningExplorer/Generic/StdDetails.aspx	457068	13.82%	121566	16.23%
3	Online Standard Results - Planning http://plan1.eppingforestdc.gov.uk/Northgate/PlanningExplorer/Generic/StdResults.aspx	351886	10.64%	93144	12.44%
4	Home - Epping Forest District Council http://www.eppingforestdc.gov.uk	322445	9.75%	235106	31.39%
5	Planning Application Search http://plan1.eppingforestdc.gov.uk/Northgate/PlanningExplorer/GeneralSearch.aspx	182286	5.51%	97146	12.97%
6	Contact us http://www.eppingforestdc.gov.uk/index.php/contact-us	55063	1.67%	37106	4.95%
7	Job Vacancies - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/your-council/jobs-and-volunteering/job-vacancies	52606	1.59%	40542	5.41%
8	Planning and building - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/planning-and-building	51342	1.55%	30583	4.08%
9	Pay it - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/pay-it	39782	1.20%	33820	4.52%
10	When is my collection? - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/when-is-my-collection	39494	1.19%	28925	3.86%
11	Development Control - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/planning-and-building/planning-development-control	38924	1.18%	29045	3.88%
12	Planning Application Search http://plan1.eppingforestdc.gov.uk/Northgate/PlanningExplorer/ApplicationSearch.aspx	30929	0.94%	19611	2.62%
13	Council Tax - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/council-tax	25327	0.77%	17415	2.33%
14	Pay it http://www.eppingforestdc.gov.uk/index.php/pay-it?task=weblink.go&id=4	21321	0.64%	19463	2.60%
15	How much is my Council Tax? - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/council-tax/how-much-is-my-council-tax	20418	0.62%	7586	1.01%
16	Recycling and waste - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste	16631	0.50%	12448	1.66%
17	Housing - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-home	15511	0.47%	10615	1.42%
18	Results - Planning http://planpub.eppingforestdc.gov.uk/NIM.websearch/Results.aspx?grdResultsP=2	15268	0.46%	3760	0.50%
19	Your council - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/your-council	15057	0.46%	11085	1.48%
20	Waste and environment - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment	14839	0.45%	11042	1.47%

21	Applying for a council or housing association home - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-home/housing-advice/applying-for-a-council-or-housing-association-home	14587	0.44%	10534	1.41%
22	North Weald Airfield - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/out-and-about/north-weald-airfield	11974	0.36%	9359	1.25%
23	Elections and voting - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/your-council/elections-and-voting	11712	0.35%	8274	1.10%
24	4 Day Week - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/4-day-week	11226	0.34%	7578	1.01%
25	Planning Our Future - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/contact-us/consultation/planning-our-future	10821	0.33%	7165	0.96%
26	Revised collection dates - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/revised-collection-dates	10702	0.32%	8018	1.07%
27	Your Councillors http://rds.eppingforestdc.gov.uk/mgMemberIndex.aspx?bcr=1	10382	0.31%	5877	0.78%
28	Jobs and Workforce Information - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/your-council/jobs-and-volunteering	9816	0.30%	7101	0.95%
29	Meetings, agenda, and minutes http://rds.eppingforestdc.gov.uk/uuCoverPage.aspx	9772	0.30%	7653	1.02%
30	Session Timeout http://planpub.eppingforestdc.gov.uk/NIM.websearch/Timeout.aspx	9393	0.28%	7185	0.96%
31	http://www.eppingforestdc.gov.uk/index.php/residents/planning-and-building/building-control	9119	0.28%	6746	0.90%
32	Monthly meetings calendar - December 2015 http://rds.eppingforestdc.gov.uk/mgCalendarMonthView.aspx?GL=1&bcr=1	9057	0.27%	6040	0.81%
33	Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/pay-it?task=weblink.go&id=293	8941	0.27%	8020	1.07%
34	How to apply for Planning Permission - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/planning-and-building/planning-development-control/how-to-apply-for-planning-permission	8937	0.27%	6561	0.88%
35	Epping Forest District Council News Centre http://www.eppingforestdc.gov.uk/news/	8827	0.27%	6110	0.82%
36	Results - Planning http://planpub.eppingforestdc.gov.uk/NIM.websearch/Results.aspx?grdResultsP=1	8631	0.26%	2095	0.28%
37	A-Z of Services - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/a-z	8533	0.26%	6255	0.84%
38	Special collection - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/special-collections	8239	0.25%	6517	0.87%
39	Planning Home http://plan1.eppingforestdc.gov.uk/Northgate/PlanningExplorer/Home.aspx	7507	0.23%	5147	0.69%
40	Our Offices - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/contact-us/our-offices	7496	0.23%	6137	0.82%
41	Building Control Application Search http://plan1.eppingforestdc.gov.uk/northgate/buildingcontrol/ApplicationSearch.aspx	7388	0.22%	3620	0.48%
42	Who represents you? - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/your-council/who-represents-you	7098	0.21%	3715	0.50%
43	Housing advice - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-home/housing-advice	7084	0.21%	5283	0.71%
44	Apply for it - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/apply-for-it	7004	0.21%	5593	0.75%
45	Residents - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents	6499	0.20%	5215	0.70%
46	Recycling banks and centres - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/recycling-banks-and-centres	6109	0.18%	4494	0.60%
47	Planning applications - Weekly list of planning applications - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/contact-us/consultation/planning-applications	6060	0.18%	3806	0.51%

48	What can I recycle and how? - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/residents/your-environment/recycling-and-waste/what-can-i-recycle-and-how	5760	0.17%	4520	0.60%
49	File store - Current Policy - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/home/file-store/category/168-current-policy	5670	0.17%	3393	0.45%
50	Report it - Epping Forest District Council http://www.eppingforestdc.gov.uk/index.php/report-it	5555	0.17%	4295	0.57%

Social Media Interactions

Twitter and Facebook		Followers	Following	Tweets	Facebook Likes
Epping Forest District Council @eppingforestdc	19Feb14	3,246	857	3,507	1,101
	17Nov14	4,189	1,005	5,804	1,208
	05 Jan16	5,547	1,144	9,727	1,698
	Increase	70.9%	33.49%	177.36%	54.22%
Other Council Twitter and Facebook Accounts	19Feb14	1,357	970	2,643	1,365
	17Nov14	2,913	1,919	6,338	3,525
	05 Jan16	4,423	2,664	9,676	5,836
	Increase	225.9%	174.6%	266.1%	327.5%
Twitter and FB Accounts Combined	19Feb14	4,603	1,827	6,150	2,454
	17Nov14	7,102	2,924	12,142	4,733
	6 Jan16	9,970	3,808	19,403	7,534
	Increase	116.6%	108.4%	215.5%	207.0%
Flickr		photos	Viewed	Comments	Favourites
@eppingforestdc	19Feb14	1,426	200,895	11	48
	17Nov14	3,584	471,025	15	63
	06 Jan16	4,719	809,626	18	95
	Increase	3,293	608,731		
YouTube		Videos	Views	Subscribers	
@eppingforestdc	19Feb14	85	28,429	30	
	17Nov14	117	40,411	41	
	06 Jan16	140	49,081	65	
	Increase	55	20,652	35	
Website News Releases (Wordpress)		Published	Pages views		
	19Feb14	2,002	20,654		
	17Nov14	2,212	200,799		
	06 Jan16	1,677	384,208		
	Increase	(535)	363,554		

Internal Managers Channel Shift Survey

Key:

- a) Webform
- b) Web CRM/CMS
- c) Email
- d) Social Media
- e) Intranet
- f) Phone
- g) Letters
- h) Print
- i) Face to Face
- j) Other

	Section and Officer	a	b	c	d	e	f	g	h	i	j	Comments
1	Benefits Steven Smith		5	4			2	3	6	1		Info staff would need training to deal with Benefit enquires
2	Hsing Man North Jackie Manning	8	6	2	5	7	1	4	9	3	10	Could use reception for straightforward enquires and signposting
3	Planning Policy Nicola Court			1			3	2				Website FAQs could be produced (exists)
4	Internal Audit and Fraud Sue Linsley			2			1	3				
5	Planning Governance Theresa Parker			1			1			1		Need planning/building control/land charges knowledge and access to M3 and Maps
6	Bus Support and Process Sharon Lekha			3			2	1		4		Opening/scanning/indexing - personal data and confidential information - secure office env - burials
7	PR and Info Tom Carne	2	1	1	1	1	1	3	1	1		PR/Chairman/Website/Social Media/Consultation/Info Desk/Internal Coms
8	Private Sec Hsing Sally Devine	7	5	2	6	8	1	4		3		Private sector tenants complaints
9	Neighbourhoods Technical Sue Stranders	5	7	2	8	6	1	3	10	4	9	Doesn't feel any info could be given by Reception - specialist info
10	H&S HR Wendy Gains			1			1		2	1		Internal specialists function
11	Hsing Man South David Barrett	6	7	5			2	4		1	3	
12	Revenue Payments Rona Carroll	6	5	3	7	9	2	4	8	1		Cashiers and payments.
13	Learning/Dev HR Julie Dixon	2	1	1			1					Apprenticeship job info
14	Legal Prop and Planning Ruth Rose			1			3	2			1	Still using memos
15	Land Charges Jill Tautz	1		4			2	1		3		

	Section and Officer	a	b	c	d	e	f	g	h	i	j	Comments
16	Culture Alex Huga	3	4	2			5		1	6		Bookings and general info
17	Housing Assets Haydn Thorpe	9	7	2	8	6	3	1	5	4		Tenants appointments, enquiries, complaints
18	Neighbourhoods Contact Centre Julie Barnard	2		3	4		1	5		6		Enquires could be done centrally with access to right systems
19	Legal Land Charges & Complaints Alison Mitchell			2			3	1	5	2		Personal Searches/Legal enquiries - confidential interviews - defendents, debtors, solicitors leaseholders etc

Stream 3 - Implementation of a Customer Relationship Management (CRM) System

1. History of issue being reviewed

- 1.1. The previous review of Customer Contacts noted the lack of a Customer Relationship Management (CRM) system, and deficiencies in the telephone system that would have made implementation of one difficult.
- 1.2. At the time of the previous review CRM systems were generally large complex systems with a prohibitive cost; the cost and technical considerations prevented the implementation at the Council being progressed at that time.

2. Statement of the problem we are trying to address

- 2.1. As a result, at present there is still no central system for recording customer contacts, although the technical issues around the telephone system have now been overcome after the implementation of the ShoreTel system.
- 2.2. It must be noted that major synergies exist between this and the channel shift project, as a fully capable CRM system would be a core component in the delivery of channel shift.
- 2.3. This project is considering the Implementation of a CRM system, and as such must touch upon the broader principles of Customer Relationship Management across EFDC.
- 2.4. It must also be noted that many of our business areas have effective CRM systems in place using their existing business system, and other areas could easily make use of their systems for this purpose

3. Stream scope / assumptions or constraints imposed by team or members

- 3.1. This project is not considering the location of a call centre capability, as a CRM system could be used equally well by a contact team in a single location, or a 'virtual' contact team spread across multiple locations and sites.

4. Research and Analysis

- 4.1. In formulating our report we have used the following sources of information for research:
 - Consultation with Leadership team has to ascertain desired capabilities. (Appendix 1)
 - Research of currently available systems via supplier websites and using the Government Digital Marketplace
 - Discussion with software and service vendors to understand what can be delivered and at what cost
 - Discussion with Chelmsford City Council as part of an overall site visit.

5. What analysis didn't we achieve and how has this affected the project direction?

- 5.1. Further site visits were not carried out, but as this project is considering the concept of a CRM system as opposed to the detailed implementation this is not an adverse factor.

6. What data have we used?

- 6.1. In the creation of the report the following data has been used:

- CRM Licence costs - These prices reflect the CRM element, are exclusive of implementation costs and integration costs, and are taken from the Government Digital market place. In addition in any solution there would be chargeable costs from the supplier for implementation and for any integration. Integration may also have costs incurred against the suppliers of the back office systems, and for any potential middle ware that is required.
- Potential integration costs - The integration between the waste system and Biffa cost EFDC in the region of £51,000 (excluding any EFDC staff costs) – this cost only reflects the cost of integration on the EFDC side, the Biffa figure is likely to be similar giving a potential cost of £100,000 per integration.
- CRM Capabilities information from suppliers and Government Digital Marketplace
- Demonstration of CRM systems
- Discussion with Website Development Board
- Feedback and survey data from Leadership team and Managers.

Feedback from The Leadership Team

The Leadership Team deemed the following capabilities for a CRM System as being of vital importance to both EFDC and Customers (please see Appendix 1 for explanations of these capabilities).

- App
- Citizen Portal
- Customer Knowledge Base/FAQ
- Customer Self Service logging
- Generation of Correspondence
- Geo-Location
- Integration with Business Systems: Academy
- Integration with Business Systems: AIMS
- Integration with Business Systems: ArcGIS
- Integration with Business Systems: Cash Receipting
- Integration with Business Systems: Estates System
- Integration with Business Systems: Exchange Email
- Integration with Business Systems: Information@Work
- Integration with Business Systems: M3 Land & Property
- Integration with Business Systems: M3 Public Protection
- Integration with Business Systems: OHMS
- Integration with Mears Repairs
- Online Forms
- SMS (Text Messages)
- Stored Customer Profiles for Self Service
- Transparency of Progress
- Web Services

7. How have we used this data to support or recommendations?

- 7.1. This data has allowed the creation of a broad requirement which has allowed an estimated cost to be arrived at.

8. Where do the results of the analysis take us?

- 8.1. The CRM systems investigated all include an element of per user charging. This means that a CRM system used by 650 staff would have a significantly higher purchase and recurring cost than one used by 50 staff in a contact team (whether in a single location or dispersed).
- 8.2. A CRM system available to all staff would allow the logging of queries from any area directly into the CRM system (and potentially thence to the business system (for example planning) via integration). However, the practicalities of cross training all staff on all areas would be challenging, and given that many staff do not receive calls from the public either by accident or design it must be questioned on the return on investment a site wide implementation would give. A system for all 650 staff to use directly has indicative annual costs between £117,000 and £402,948. This is dependent on the supplier and the level of risk the Council is prepared to accept for such a critical system (the lowest cost options are Open Source and with very limited support).
- 8.3. There is also an issue around training, and the purpose of the CRM system. The CRM system is usually seen (in most business areas) as a way of capturing customer contacts, the case work remains in the business system. This means that to ensure staff using the CRM system can access the required data they would need either data integration, or access to the business systems. If either situation was to be the case there would be a need for staff training in how to understand the information or how to interrogate all the systems involved – doing this for 650 staff (and keeping them up to date) would give little benefit for the costs involved.
- 8.4. Buying a smaller number of CRM system licenses for contact staff, and giving all other staff the ability to fill in a simple structured contact logging form which would create a record in the CRM must be considered as an alternative to reduce the investment required for all staff to have access - which would likely give little benefit in many cases. A system for 50 staff to use directly has indicative annual costs between £9,000 and £141,935 depending on the supplier and the level of risk the Council is prepared to accept for such a critical system (again the lowest cost options are Open Source and with very limited support).
- 8.5. Modern CRMs also extend outside the Council, so a self-service portal (key to channel shift) is a key component of any system. As we already have (or will shortly have) the capability for dedicated portals for the Revenues (Capita Connect), Public Protection and Planning systems (Northgate eNgage for both) it is key to pursue integration of these public facing front ends to simplify the customer experience.
- 8.6. Integration to a business system would potentially allow capture of queries in the CRM system, and allow updates to be passed from the business system back to the CRM system.
 - Each distinct integration that needs to be implemented to a business system (for example planning) would increase the cost, complexity and implementation time
 - The benefits that full integration would give when compared to the costs involved must be questioned.
 - In total the Leadership Team highlighted a requirement for 11 integrations as being of vital importance to both EFDC and customers, and a further 2 as being of high importance to both. This could give a potential indicative implementation cost in excess of £1 million for integrations; there would also be annual costs. In addition, integration work would have to be repeated if a business system was modified or replaced. This suggests that integration should be targeted at areas where it can be delivered at a relatively low cost, or at areas with the highest volumes of calls where it can give the most benefit.

- Discussion with Chelmsford has shown though that in some cases (Capita Academy Revenues and Benefits) CRM integration does not provide the required data, and Contact Centre staff are logging into both the CRM and Academy)

- 8.7. The internal cost in terms of staff resource would increase as the system becomes more complex with integrations, and as more users are added (overall training costs)
- 8.8. The costs indicated above would be licence cost only, in addition in any solution there would be chargeable costs from the supplier for implementation and for any integration. Integration may also have costs incurred against the suppliers of the back office systems, and for any potential middle ware that is required.
- 8.9. Using the CRM system to replace the business systems is notionally possible, but the level of customisation required and upkeep would be prohibitive.
- 8.10. Giving Contact staff access to business systems to investigate queries directly would offer similar benefits to the customer, but without the need to integrate. However, if a query raised in the CRM system had to be transferred to the business system it would require rekeying, and similarly the entry on the CRM system would require manual updating.
- 8.11. Neither an on premise nor cloud based solution has been discounted at this time, and there are considerable benefits in terms of resilience from a cloud based system. A cloud based solution could also be made available for the out of hours cover (Mears) to access and record queries.
- 8.12. Northgate are currently upgrading their M3 product to make use of a web browser based user interface for internal users and the general public, the screens are simplified making their use as part of a CRM solution much more straightforward than use of the current back office application.
- 8.13. The creation and maintenance of online forms, and the necessary set up work in a CRM solution requires additional resources within ICT. Experience has shown that work of this nature is best located within Corporate ICT as opposed to being embedded within Directorates.
- 8.14. A management board report has already been prepared by the Website Development Board seeking funding for an additional post within ICT to deliver the online forms element including some systems integration work which would feed into the CRM and form part of any online customer portal. (Appendix 2)

9. Discussion of validation or sensitivity analysis which is done for the model and results

- 9.1. These findings broadly matched the outcome of discussions with Chelmsford City Council, suppliers of CRM systems and also other software suppliers without a commercial interest in the sale of a CRM system.
- 9.2. Based on experience elsewhere, and best practice suggested by suppliers, a roll out of the full CRM to only the customer contact team(s) is the option normally pursued. Other staff will have the ability to log an issue into the CRM but not progress it using a simple form.

10. Conclusions

- 10.1. The analysis indicates that the benefits resulting from a roll out of the full CRM to all staff would be outweighed by the costs involved.

- 10.2. The Implementation of a CRM system is required for Customer Contact team(s) to provide a tool for day to day call logging, and a dashboard for managers to have an overview of contacts.
- 10.3. Implementation of CRM would be gradual, potentially as teams are incorporated in a Corporate Contact centre, for this reasons the purchase of licenses could be managed to prevent licenses being purchased until required.
- 10.4. Any CRM system is to be used for contact logging, not as a business system – except in areas where there is not an existing business system.
- 10.5. The Implementation of a Customer Contact Capture form for all other staff to use to feed into the CRM, would allow the capture the contacts efficiently without the need for cross training and licences to use the CRM system.
- 10.6. The Integration of Customer Facing forms into the CRM system to create a single view of these contacts, and to allow customers to remotely access the CRM system to log issues and follow progress.
- 10.7. The Consideration of Integration to business systems on a case by case basis based on level of enquiries received and the nature of the enquiry.
- 10.8. The internal cost in terms of staff resource would increase as the system becomes more complex with integrations, and as more users are added (overall training costs).
- 10.9. Integration of online portals from other systems to the CRM online portal should be prioritised over business system integration.
- 10.10. Managers need to consider potential uses of business intelligence (BI) that a CRM system can give, as one of the key benefits of a CRM system is BI – but only if there is a use for it.

11. Recommendations for implementing proposals

- (1) That the Council should progress an additional ICT post to support the development of the form system and related integration to allow:
 - Migration of existing current Achieve Forms to the new 'Self' portal as a precursor to any CRM implementation, and to assist channel shift (cost of £36,000 p/a for 50 seat implementation).
 - Creation of a corporate customer contact capture form again as a precursor to CRM implementation
 - Implementation of integration between the public facing systems – i.e. Self and Connect, and Self and eNgage
 - Formal evaluation of the Firmstep CRM system (Achieve Service) as a potential affordable upgrade to Achieve Forms to provide a cost effective CRM system offering most of the benefits of the more costly systems in a timely and cost effective way.
- (2) That a decision is required on the number of users who will make use of the full CRM system (based upon the decisions taken about centralised or decentralised Contact Centres)
- (3) That there should be formal evaluation of the costs/benefits involved in each potential system integration should be carried out once a decision in principle has been reached about the potential use of the Firmstep CRM system.

Appendix 1 Leadership Team feedback

Importance to EFDC →	Vital	<ul style="list-style-type: none"> Business Intelligence 	<ul style="list-style-type: none"> Call/Enquiry Logging Case Management Internal Knowledge Base/FAQ 		<ul style="list-style-type: none"> Access via Self Service kiosks in EFDC Offices 	<ul style="list-style-type: none"> App Citizen Portal Customer Knowledge Base/FAQ Customer Self Service logging Generation of Correspondence Geo-Location Integration with Business Systems: Academy Integration with Business Systems: AIMS Integration with Business Systems: ArcGIS Integration with Business Systems: Cash Receipting Integration with Business Systems: Estates System Integration with Business Systems: Exchange Email Integration with Business Systems: Information@Work Integration with Business Systems: M3 Land & Property Integration with Business Systems: M3 Public Protection Integration with Business Systems: OHMS Integration with Mears Repairs Online Forms SMS (Text Messages) Stored Customer Profiles for Self Service Transparency of Progress Web Services 	
	High		<ul style="list-style-type: none"> Dashboard Mobile Working Workflow0 	<ul style="list-style-type: none"> Integration with Business Systems: FOI/Data Protection 	<ul style="list-style-type: none"> Access via Self Service kiosks in Libraries Access via Self Service kiosks in Parish Council Offices and sack outlets Access via Self Service kiosks in Sports Centres Integration with Business Systems: FIMS – Limited Integration with Telephony Social Media Monitoring Web Chat 		
	Moderate	<ul style="list-style-type: none"> Integration with Business Systems: ICT Service Desk Integration with Business Systems: Payroll/HR 					
	Low	<ul style="list-style-type: none"> Open Data Standards 	<ul style="list-style-type: none"> Access via mobile Self Service kiosks Integration with Business Systems: SharePoint 				
	Not Required	<ul style="list-style-type: none"> Integration with Business Systems: eFinancials Integration with Business Systems: Express Elections Integration with Business Systems: FIMS – Full Integration with Business Systems: Modern.gov Integration with Business Systems: Museum Integration with Business Systems: TEN Integration with Business Systems: Tricostar (Timebase) 					
	Not Required	Low	Moderate	High	Vital		
Importance to External Customers →							

Explanation of Items

1. Access via mobile Self Service kiosks
 - Residents can access the self-service element of the CRM via mobile EFDC Kiosks in (eg) a Mobile Library or Mobile EFDC Office via 4G
2. Access via Self Service kiosks in EFDC Offices
 - Residents can access the self-service element of the CRM via EFDC Kiosks in EFDC Offices
3. Access via Self Service kiosks in Libraries
 - Residents can access the self-service element of the CRM via EFDC Kiosks in Libraries
4. Access via Self Service kiosks in Parish Council Offices and sack outlets
 - Residents can access the self-service element of the CRM via EFDC Kiosks in Parish Council Offices or sack outlets
5. Access via Self Service kiosks in Sports Centres
 - Residents can access the self-service element of the CRM via EFDC Kiosks in Sports Centres
6. App
 - The CRM includes an App for self service use on smartphones/tablets
7. Business Intelligence
 - Would allow querying and reporting of records stored in the CRM to identify trends
8. Call/Enquiry Logging
 - Allows staff to log queries and reported issues in the CRM
9. Case Management
 - Allows issues to be managed in full in the CRM without recourse to an external business system
10. Citizen Portal
 - Residents can log in to a self-service screen and view key information about themselves
11. Customer Knowledge Base/FAQ
 - Allows customers to search for answers to queries and issues online
12. Customer Self Service logging
 - Allows customers to log own queries and report issues online
13. Dashboard
 - An at a glance view of open issues
14. Generation of Correspondence
 - A CRM can generate letters to residents in response to an issue
15. Geo-Location
 - Integrated mapping allowing locations to be pinpointed from a map when a report is made
16. Integration with Business Systems: Academy
 - Would allow data from the Revenues and Benefits system to be pulled into the CRM, and issues/queries logged via the CRM
17. Integration with Business Systems: AIMS
 - Would allow data from the Invoicing/Debt Management system to be pulled into the CRM, and issues/queries logged via the CRM
18. Integration with Business Systems: ArcGIS
 - Allows integration of mapping for data display, and also potentially plotting from CRM
19. Integration with Business Systems: Cash Receipting
 - Allows payments to be taken from the CRM
20. Integration with Business Systems: eFinancials

- Would allow data from the General Ledger system to be pulled into the CRM, and issues/queries logged via the CRM
- 21. Integration with Business Systems: Express Elections
 - Would allow data from the Electoral Registration system to be pulled into the CRM, and issues/queries logged via the CRM
- 22. Integration with Business Systems: Estates System
 - Would allow data from the Commercial property management system to be pulled into the CRM, and issues/queries logged via the CRM
- 23. Integration with Business Systems: Exchange Email
 - Would allow sending/receiving of emails by the CRM
- 24. Integration with Business Systems: FIMS – Full
 - Would allow data from the Fraud Investigation system to be pulled into the CRM, and potential Fraud reports to be logged via the CRM
- 25. Integration with Business Systems: FIMS – Limited
 - Would allow potential Fraud reports to be logged via the CRM, and give limited feedback on outcome
- 26. Integration with Business Systems: FOI/Data Protection
 - Would allow data from the FOI/DP request management system to be pulled into the CRM, and issues/queries logged via the CRM
- 27. Integration with Business Systems: ICT Service Desk
 - Would make the CRM usable for logging of ICT/FM issues
- 28. Integration with Business Systems: Information@Work
 - Would allow images from the Corporate Document Management system to be viewed via the CRM
- 29. Integration with Business Systems: M3 Land & Property
 - Would allow data from the Planning, BC and Land Charges system to be pulled into the CRM, and issues/queries logged via the CRM
- 30. Integration with Business Systems: M3 Public Protection
 - Would allow data from the Waste and Environmental system to be pulled into the CRM, and issues/queries logged via the CRM
- 31. Integration with Business Systems: Modern.gov,
 - Would allow data from the Committee Management system to be pulled into the CRM, and issues/queries logged via the CRM
- 32. Integration with Business Systems: Museum
 - Would allow data from the Museum collection management system to be pulled into the CRM, and issues/queries logged via the CRM
- 33. Integration with Business Systems: OHMS
 - Would allow data from the Housing system to be pulled into the CRM, and issues/queries logged via the CRM
- 34. Integration with Business Systems: Payroll/HR
 - Would make the CRM usable for logging of HR/Payroll queries
- 35. Integration with Business Systems: SharePoint
 - Would allow data from SharePoint (which may replace our intranet) to be pulled into the CRM to help staff answer queries.
- 36. Integration with Business Systems: TEN
 - Would allow data from the KPI system to be pulled into the CRM, and issues/queries logged via the CRM
- 37. Integration with Business Systems: Tricostar (Timebase)
 - Would allow data from the Legal Case management system to be pulled into the CRM, and issues/queries logged via the CRM
- 38. Integration with Mears Repairs
 - Would allow data from the Repairs system to be pulled into the CRM, and issues/queries logged via the CRM

- 39. Integration with Telephony
 - Allows issues to be raised based on caller details which are picked up automatically
- 40. Internal Knowledge Base/FAQ
 - Allows staff to search for answers to queries and issues within the CRM
- 41. Mobile Working
 - CRM Workflow can be used by staff on Mobile Devices
- 42. Online Forms
 - Extends self-service by allowing the creation of forms on the website which feed straight into the CRM
- 43. Open Data Standards
 - Allows easier external interchange of data
- 44. SMS (Text Messages)
 - CRM can send messages and reminders as SMS
- 45. Social Media Monitoring
 - CRM can be used to monitor (eg) Facebook and Twitter, and raise issues based on those channels
- 46. Stored Customer Profiles for Self Service
 - Allows registration and logging in by customers, which retains key information
- 47. Transparency of Progress
 - Residents can log in and view the progress of the issue they have logged
- 48. Web Chat
 - Online chat box, which allows customers to interact directly with staff in working hours
- 49. Web Services
 - Allows integration of other Business Systems
- 50. Workflow
 - Creates an automatic process and escalation for queries/reported issues

REPORT TO THE MANAGEMENT BOARD

Date: [Day Month Year]
Subject: Website Staffing
Author/Service: Steve Bacon ICT (Resources)

Recommendations:

- (1) To agree the creation of a website technician post as part of the ICT Business Support Team.
- (2) To transfer responsibility for customer facing online forms to ICT

Reasons for Proposed Decision:

To ensure that the website resource is available to develop other online tools such as online forms, self-service and online mapping, GIS functionality.

Other Options for Action:

- 1, To not fund a post meaning we cannot deliver online systems to improve the customer experience.
- 2, To fund the post from DDF for an initial period to allow the benefits of the post to be demonstrated
- 3, To fund the post from invest to save for an initial period to allow the benefits of the post to be demonstrated
- 4, To locate the post in PR, which would reduce the technical access that can be given to it and also remove the synergies gained from working alongside the GIS team on the web mapping system and the Business Analysts on making back office systems accessible online
- 5, Funding the post from existing ICT budgets was considered, but as ICT has already funded the creation of the required additional posts for the Corporate Gazetteer/GIS Team insufficient resource was identified in the remaining budget to allow for this.
- 6, Use of existing staff resource within ICT has also been considered, but given other corporate projects, and normal business requirements, insufficient resource is available to give the post the level of resource required to deliver maximum benefits.

Report:

1. At its meeting of 16th April the Website Development Board requested that a report be submitted to Management Board for the creation of a permanent Website Support post funded by a contribution from each Directorate (including a contribution from the HRA).
2. Based on similar support roles within ICT we anticipate this post would be a Grade 4, which would cost around £17,500 excluding on costs.
3. Currently Directorates are experiencing difficulties in finding sufficiently skilled staff to update and maintain existing online forms, as well develop new online forms. PR is notionally responsible for public facing forms, this work is often a lower priority than other work that has to be completed-this same issue is experienced in Directorates as well. ICT provide support on the public facing forms where possible, but are currently not responsible for the public facing part of our forms system beyond the online bookings form.

4. It was proposed by the Website Development Board that this post would contribute to the more involved website technical work that is currently done by ICT as opposed to the content based work done by PR. The post would also be involved in the management of our other existing public facing web systems (Planning Explorer, Information:@work, Capita Connect, Capita Engage) and the planned ones such as Northgate Ngage.

5. Licenses are already in place for corporate use of the Achieve forms and ArcGIS online systems that this post holder would be involved in developing as the basis for an enhanced self-service offering as the precursor to a corporate CRM or otherwise as tools to drive channel shift.

6. SOCITM (Society of IT Managers) data (2012) suggests the following costs to Council per contact

- Face to Face £8.62
- Telephone £2.83
- Web £0.15

7 Given our website currently receives 17,000 weekly visits, there is clear scope to increase this number and move some of the 2,000 weekly visitors to main reception (saving £8.47 per visitor) and 35,000 phone callers (saving £2.68 per caller) to using the website as their channel of contact – moving just 0.1% of these phone calls to online channels would represent a potential efficiency saving of around £5,000 a year. OAs an example, if this post was to create online forms that shifted only 5% of our reception visitors (100 from an average of 2,000 per week) from face to face contact to using the web and online forms it would cover the cost of the post over a year. Use of online forms will also simplify internal processes and reduce the need for scanning and post handling.

8. The post could theoretically be located in either ICT or PR. The preference of the website development board was that this post should sit within ICT for the following reasons:

- Controlled access can be given to to the relevant servers in the case of integration work if the post holder is located and supervised within ICT.
- This post could become part of the on call arrangements for website technical support.
- This post will be working closely with Business Analysts in implementing improvements to business process.

9. Additional benefits of the post being within ICT are that

- The helpdesk infrastructure can be used for the logging and prioritising of workload,
- The post can work as an integral part of the team developing our new ESRI ArcGIS based web mapping system.
- This resource would not be affected by factors such as the election which cause a substantial bulge in PR workload on the website and lead to routine work on the website being a lower priority.

10. Evaluation of the website recently has shown that quality and style does vary between Directorates and publishers in all areas including forms, the creation of this post to work closely with existing ICT and PR resources will address this problem. As part of its role as it develops this post would also provide website training for all publisher.

11. As the Council moves towards more flexible ways of working, and is looking to improve the overall customer experience the development of online forms and links to back office systems will become more important, this post would support that work by working on form design, and as part of ICT would liaise closely with the relevant business analysts in each area on integration.