

Pembrokeshire County Council

Customer Service Channel Shift Strategy 2019-2022

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Foreword

Many forewords begin with a sentiment suggesting that 'It is with great pleasure that I present this strategy' before telling the reader why the strategy is the right thing to do. In this case, it really isn't a pleasure to introduce this strategy because essentially we are talking about the reduction of council services that customers have come to appreciate and rely upon. But it is the right thing to do, and I'll explain why.

If you've taken the time to find and read this strategy, then you will already be very familiar with the financial challenges facing local government, and the prospect of further budget reductions to come. You'll also appreciate that council tax increases have helped us paper over the cracks that reductions in central funding have caused, and no doubt you'll also recognise that we have worked hard to maintain services where we can.

But fundamental change is needed. With education, social care, housing, and regeneration high priorities for us (amongst others), we need to divert as much resource into these areas as we possibly can, and we also need to take advantage of the digital revolution that's happening around us. Pembrokeshire County Council and the communities it serves are not exempt from the massive advances in technology that have occurred over the last few decades, and so it really is time to move up a gear and embrace the possibilities of technology in delivering modern public services.

So whilst it's not pleasant to be reducing the face to face customer service provision, we will be increasing our range of digital customer service options. We are committed to making your online dealings with us as easy as possible, more convenient, and open 24/7 for many simple queries. We do recognise that digital exclusion is still an issue, and so we are working hard to improve connectivity across our County, and will also retain a telephone and appointment based face to face system for those who really do struggle with the internet, or have more complex queries. By working together in this way, we will be able to divert more of our time and resources to helping those customers who need more specialist help, and to those things that will make a big difference for Pembrokeshire in years to come.

Councillor Neil Prior
Cabinet Member for Transformation & IT



Introduction

Pembrokeshire is a large rural county made up of a small number of larger towns, with areas that are more sparsely populated particularly in the North of the County. Providing services across a diverse landscape and population is made particularly challenging when there is inconsistent broadband and mobile coverage experienced across the County.

However, technology is advancing at a phenomenal pace, supported by reducing equipment costs and the upgrading of the infrastructure that supports it, to provide faster, better and wider access to online services.

We are in a strong position to be able to utilise technology to help us to improve our Customer Services offering and are already some way along this journey.

Encouraging and supporting our customers to move online for accessing and paying for services means that our customers can also gain the benefits that this offers:

- Flexibility: more customers benefit from the flexibility that using digital services offers
- Access: online services and payments are available 24/7
- Choice: another means of accessing information and services after normal business hours, in their language of choice via multiple devices
- Reduce Pembrokeshire's carbon footprint: through uptake of digital services, reduce their need to travel to access services and reduce paper coming into the council
- Economic and social advantage, reduce isolation and social exclusion

Shifting customers from face-to-face or telephone contact to using digital channels has the potential to make significant savings and improvements in the way we deliver customer services in financially challenging times. Digital transactions have been shown to cost organisations significantly less than traditional face-to-face or telephone contact via contact centres (SOCTIM 2012). It also provides the means to meet customer expectations and needs, providing them with more choice and control.

When implementing this strategy, it is important to consider how we offer support to customers who are “digitally excluded” from accessing our services. The reality is that digital participation of specific groups of people remains difficult to achieve. Barriers to digital participation include a lack of skills, confidence, motivation and internet access. We need to ensure that these customers are supported and offered a suitable means of accessing and paying for services. Consulting and supporting customers, especially ‘slower adaptors to changes in technology’, is an important step towards increasing their digital participation.

The Way Forward for Customer Services

Pembrokeshire County Council is facing significant financial challenges for the foreseeable future. An ambitious Transformation Programme supported by an effective ICT and Customer Services Channel Shift Strategy, will help us face that challenge and to achieve real transformational change in the way we deliver our customer services ensuring our customers remain at the heart of our vision.

Our Corporate Vision

“Working together: improving lives”

Our Customer Services Channel Shift Vision

“Delivering positive and sustainable change in the way we deliver customer services, where our customers choose to transact with us digitally when accessing and paying for services”

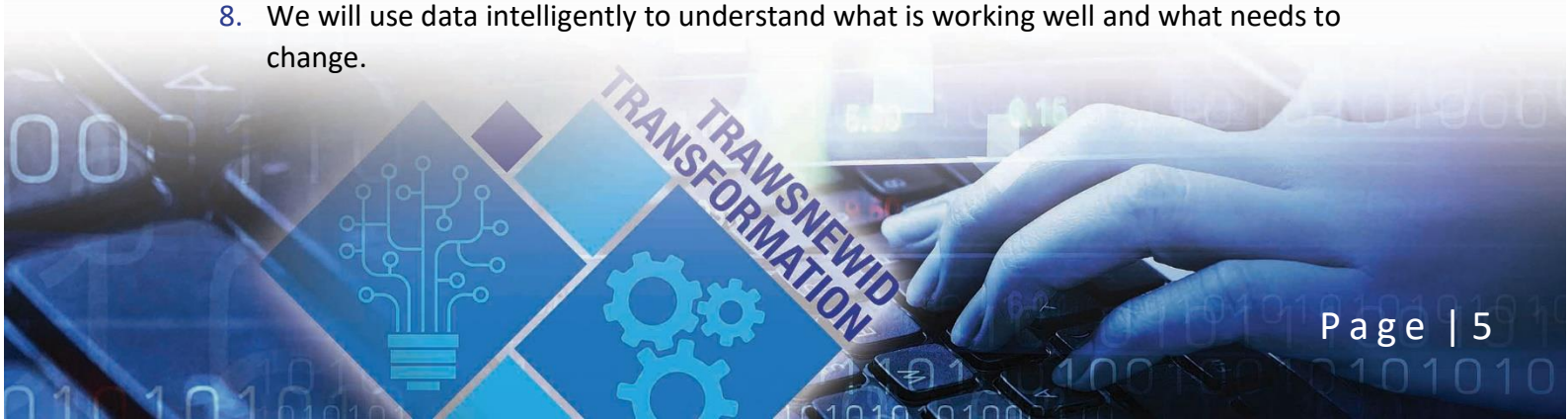
Overarching Objective:

“To encourage and support customers to use digital channels for communication and accessing or paying for services”

A channel, in this context, is the name given to the various ways in which customers can access the Council’s services e.g. by telephone, face to face, online.

To deliver our vision:

1. We will develop and expand our digital offering so that customers choose to transact with us digitally in a manner that is convenient to them.
2. Our contact centre will be available for customers who wish to speak to an advisor.
3. We will move to an appointment basis for face-to-face conversations. Customers in crisis can still access support on a drop in basis.
4. We will collaborate with partners across public, private and voluntary sectors to support our customers to shift channels.
5. We will encourage digital payments, moving away from accepting cash and cheque payments.
6. In the longer term, we will develop a single Customer Services Hub in Haverfordwest.
7. A marketing campaign will highlight our digital services.
8. We will use data intelligently to understand what is working well and what needs to change.



Pembrokeshire's Customer Services Journey

- Pembrokeshire's Customer Services offering supports a wide range of services with approximately 1.2m customer transactions (face to face, phone and online) undertaken during 2018/19. £21.5m of income was taken via Customer Services Centres (CSCs) in 2018/19.
- Over time, the number of transactions undertaken at CSCs has fallen as more customers use online alternatives. Customers predominantly use our CSCs to make payments and access other services. The most popular type of cash payments is for housing rent and council tax and account for 38% of all payments made at our CSCs.
- As part of the Council's service prioritisation: a radical change programme designed to deliver efficient, cost effective services to enable the Council to achieve the required financial savings, Cabinet decided on the phased closure of four CSCs, Fishguard, Milford Haven, Neyland and Tenby (CSC elements only), to be in place by the 30th June 2019.
- To minimise the impact on our most vulnerable people, CSCs at Argyle Street, Pembroke Dock and Haverfordwest North Wing, will be kept open, whilst a channel shift strategy is developed and implemented.
- This Customer Services Channel Shift Strategy will underpin the phased closure of our CSCs and will help us to achieve transformational change in the way we engage with our customers and deliver our services.
- The intention, within the life cycle of this strategy, is to move towards an appointment based, central customer service hub in Haverfordwest.

Local & National Context for Channel Shift Strategy Development



186 glorious miles of coastpath
125,000 residents

Our population:
17% under 16
25% over 65

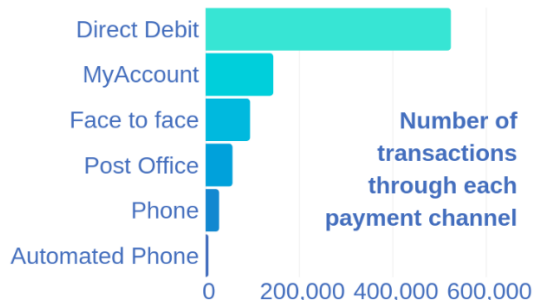
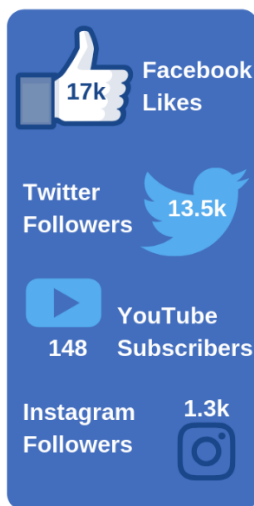
73% of those
aged 16-64 are
in employment



Digital Timeline

March 2019

Pembrokeshire County Council signs the Local Digital Declaration:
"A commitment to design services that best meet the needs of citizens, challenge the technology market to offer the flexible tools and services we need, protect citizens' privacy and security and deliver better value for money"

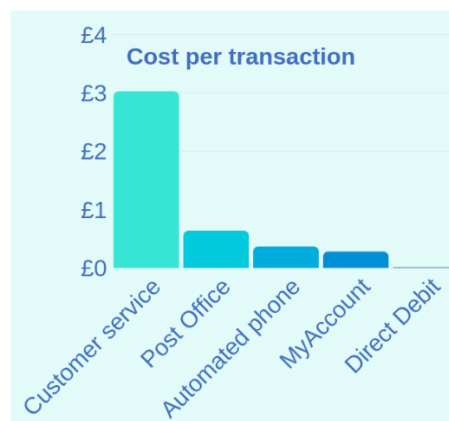


April 2019

Penfro Webchat Launched 17 April

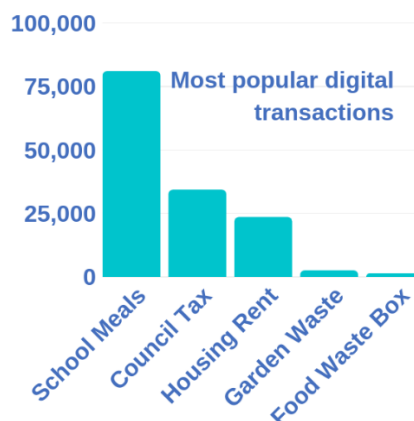
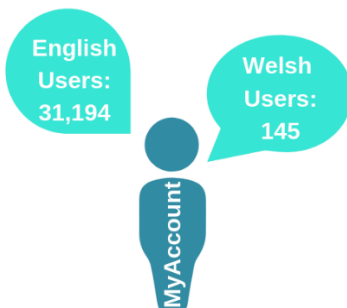


31,339
Registered
MyAccount
users



May 2019

1600 Penfro users in the first 3 weeks



Figures correct at 10 June 2019



In 2018:



90% of adults in the UK were recent internet users, up from 89% in 2017

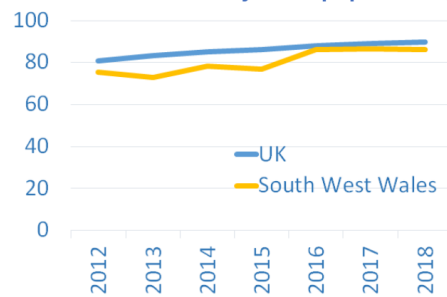
99% of adults aged 16 to 34 years were recent internet users...

...Compared with 44% of adults aged 75 years and over



80% of disabled adults had used the internet, up from 78% in 2017

Recent internet use by adult population (%)

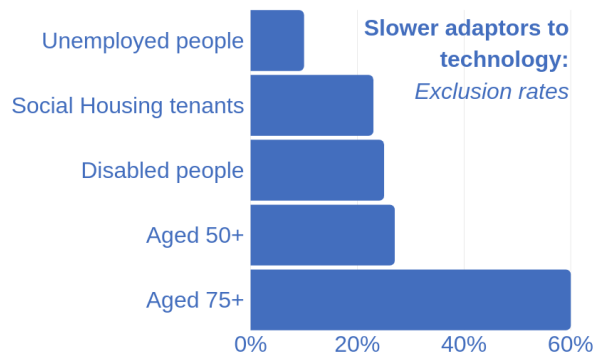


"Digital and financial exclusion are very closely linked"



5.3 million British residents did not use the internet in 2017

Welsh schoolchildren using electronic devices for at least 2 hours on a weekday

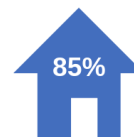


Slower adaptors to technology:
Exclusion rates



Welsh internet users bought things online in the last 4 weeks

Households in Wales accessing the internet. This has grown by 8% in 7 years.



"The role of digital technologies in enhancing health and well-being and offering the potential for significant financial savings from the take-up of self-care on the one hand and the reduction in loneliness and isolation on the other, is significant for the future financial performance of local government"

The four key barriers to basic digital capability:

Access: the ability to connect to the internet and go online

Skills: the ability to use the internet and online services

Confidence: a fear of crime, lack of trust or not knowing where to start online

Motivation: understanding why using the internet is relevant and helpful



Sources of information: Office for National Statistics: Internet users, UK: 2018

Improving people's lives through digital technologies, Digital Inclusion Progress Report and Forward Look 2018

National Survey for Wales, 2017-18, Internet use and digital skills, 22 August 2018

UK Digital Strategy Policy Paper 2. Digital skills and inclusion - giving everyone access to the digital skills they need. March 2017

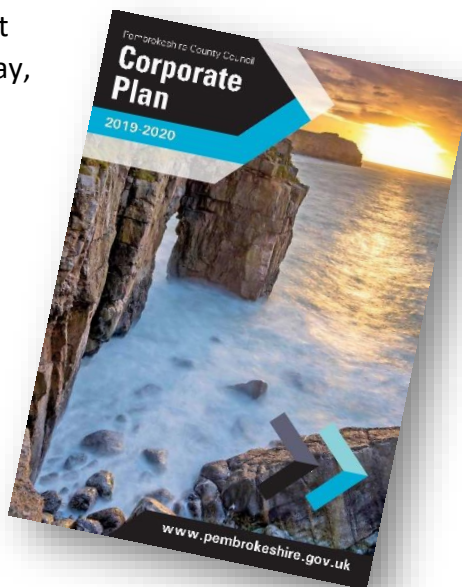
Links to Corporate Plans, Programmes and Strategies

Our Corporate Plan for 2019-20 looks to the future and sets out how we will plan and manage services in a more sustainable way, taking into account both short and long term opportunities whilst managing within financial constraints.

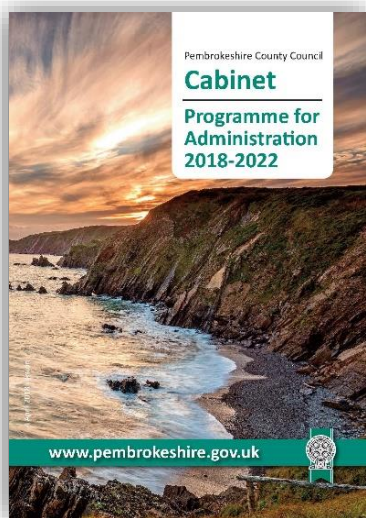
The Corporate Plan provides the road map to achieve our vision and is a requirement of the Well-being of Future Generations (Wales) Act 2015. The primary aim of the Act is improving the social, economic, environmental and cultural well-being of Wales. Our vision is:

“Working together: improving lives”

The Corporate Plan is aligned with, but is not the same as, the Pembrokeshire Public Services Board’s Well-being plan. Further detail can be found on these pages <https://www.pembrokeshire.gov.uk/public-services-board>



Programme for the Administration



The Programme for the Administration 2018-22 is a political statement which sets out the Cabinet’s aims, aspirations and priorities up until 2022. It was developed in line with the Wellbeing of Future Generations (Wales) Act 2015 and it is designed to deliver positive and lasting change for Pembrokeshire. It recognises that the world is changing and therefore may need to be adapted or changed depending on external circumstances.

This programme is arranged around the portfolios of Cabinet Members of Pembrokeshire County Council, one of which is Transformation and IT, and is key to the development of our Customer Services Channel Shift Strategy.

Economic Development and Planning and Infrastructure portfolios will also play their part in terms of working towards addressing Pembrokeshire’s comparative disadvantages of remoteness and connectivity.



Transformation



The Transformation Programme seeks to create an efficient, cost effective and modern council that is focussed on working together to improve the lives of people in Pembrokeshire.

There are three overarching themes with headline actions for transformation in 2018/19 with particular relevance to the Customer Service Channel Shift Strategy.

They are:

Technological Transformation: maximising our use of technology to enable business change, creating efficiencies, and enabling a more agile workforce:

- Increase our use of social media to communicate and engage with citizens and customers and expand the range of our services that are available on-line and their functionality.

Cultural Transformation: developing a culture that is aligned to a value based, not rule based, way of working. Key components of this are trust, being more innovative, customer-focussed and commercially-minded and delivering organisational redesign to create efficiencies and open new possibilities for the way we deliver services:

- Undertake a Service Prioritisation review across the Council to re-focus what we do on what is important to us and on what we really must do in order to meet our legal duties.
- Continue to explore different ways of delivering services in order to see if this would result in saving costs or improving quality.

Relationship Transformation: creating new partnerships, in consultation with our staff and external stakeholders:

- Continue to progress our Access to Services project. We will consult with the public and other stakeholders on options for changing how we deliver services across towns in Pembrokeshire and will reduce the number of office buildings we occupy.
- Continue to look for opportunities to share services and resources (such as premises) with other organisations in order to reduce the cost of providing services.

Information, Communication and Technology Strategy

The ICT Service provides the core technology and business software for the Authority touching all service areas and our external customers. The aim is that ICT is able to *solve business problems by working in partnership* and *maximising innovation to fit the needs of the service user*.

The Authority needs to see organisational change to be able to continue to provide services, and ICT will play a leading role in enabling this transformation.

Three themes have been identified as key to helping transform the Authority:

Agile: a flexible workforce that requires less building space.

Digital: developing an appropriate digital offer for both internal and external customers. Ensuring our digital offering is designed with the user in mind, supports the requirements of service areas, and provides a first class experience that encourages channel shift where required.

People: developing our people to be able to use technology more effectively to aid their work.

The corporate plans, programmes and strategies described above are clearly linked to and support our Customer Services Channel Shift Strategy.



Channel Shift Objectives and Development Plan

Digital Transformation Plan

Objective 1: We will develop and expand our digital offering so that customers choose to transact with us digitally in a manner that is convenient to them



In March 2019, as a local authority, we committed to work towards the principles of the Local Digital Declaration. The Local Digital Declaration is a commitment to design services that best meet the needs of citizens, challenge the technology market to offer the flexible tools and services we need, protect citizens' privacy and security and deliver better value for money. It specifically commits us to redevelop our My Account service to provide a better customer experience, improve accessibility / usability and support access via mobile devices, ultimately providing a better online experience for customers. The specific commitments are captured within the Digital Transformation Plan and clearly support channel shift, which anticipates a greater proportion of transactions to be made digitally. For the majority of customer transactions, the most efficient and appropriate channel will be via the Council's website.

We will:

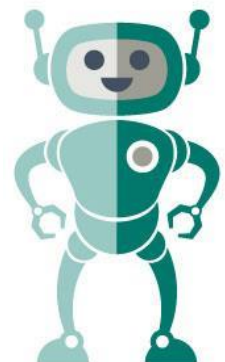
- Ensure basic principles are met: website content is concise and simple to understand, is easy to navigate and access by customers, 24/7. This will make it easier for customers to find the information they need. This includes compliance with legislation (e.g. European Accessibility Act 2018 and e-privacy law).
- Commit to providing accessible services for all our customers. In particular, we recognise both the benefits and disadvantages that digital platforms may present for

those with disabilities and / or long-term mental and physical conditions. We will continue to support customers with the provision of communication in alternative formats where needed and as we are obliged to do under the Equalities Act 2010.

- Recognise the challenges and opportunities that the provision of services via digital platforms has for Welsh speakers. We will continue to strive to ensure that, through digital development, we are able to treat the Welsh language no less favourably than the English, as we are obliged to under the Welsh Language Standard Regulations 2016.



- Continue development of our website, adding further services, until all appropriate services are available online. The most common services that our customers tell us they wish to access online will be prioritised.
- Continue to increase digital usage, utilising internal and external digital champions
- Appoint internal and external Digital Champions to help our customers understand the benefits of using My Account and support them to undertake simple tasks online.
- Continue to utilise the public library service for people who need help with the digital shift and/or don't have the equipment.
- Signpost customers to community based courses to support them to use digital channels.
- Redevelop our My Account service to drive efficiencies and deliver an improved user experience for our customers.
- Ensure online form submissions are streamlined, integrated and trackable.
- Expand our document upload facility to enable customers to quickly and securely upload and receive Council documents online.
- Allow customers to login with their social networking profile by conforming to the OAuth2 authentication standard.
- Continue development of web-chat and artificial intelligence to enhance our digital offering, reduce call volume in our contact centre and to increase response times via our social channels. Penfro, our Pembrokeshire Chatbot, was soft launched in April 2019 as part of this offering.
- Increase system integration.
- Reduce Pembrokeshire's carbon footprint through increasing uptake of digital services i.e. a reduction in the need to travel to access Council services and reduction of paper coming into the council
- Reduce costs for printing, machinery, postage and file storage, thus reducing the Council's carbon footprint through maximising the use of Electronic Document Management.



Telephone Development Plan



Objective 2: Our contact centre will be available for customers who wish to speak to an advisor.

It will be vital that contact centre staff promote digital transactions to maximise the opportunity for customers to consider making a channel shift towards digital transactions.

We will:

- Promote the new My Account system during the start of telephone conversations following its launch in October 2019. Increasing the uptake of My Account for Business will also be targeted.
- Continue to maximise the amount of enquiries that are resolved for the customer during the initial phone-call without needing further calls or transfers. This will relieve the burden on other Council service areas and create efficiency and capacity.
- Ensure that the contact centre knowledge base is up-to-date and accurate to maximise the amount of enquiries that are resolved during initial phone contact.
- Telephone customers will be told about other ways of accessing services e.g. when a customer calls the contact centre they are made aware that the service they have requested is available online so that they could choose to use the website in the future.
- Continue to develop and promote the automated telephone line (Interactive Voice Response, IVR).
- Explore the potential to use an automated message to promote digital alternatives.

Face to Face Development Plan



Objective 3: We will move to an appointment basis for face-to-face conversations. Customers in crisis can still access support on a drop in basis.

We will:

- Develop and implement an appointment based system for those customers who have more complex queries or cases or are more vulnerable customers where face-to-face transactions including payments will be the most appropriate means of problem resolution.
- Explore the potential use of Dynamic Resource Scheduling (DRS) to support the appointment based system.
- Escalate crisis situations promptly through the most appropriate means.
- Explore Skype to provide an alternative to face-to-face contact. Face to face conferencing facilities, allowing customers to speak directly to staff based within other key buildings, will also be explored.
- Explore the use of floor walkers to support customers through the closures and to help them to understand the benefits of and sign-up to MyAccount to undertake simple tasks online. Floorwalkers will be able to play a key role in supporting customers who do not have the skills, confidence or awareness of MyAccount to move to digital channels for communication and accessing or paying for services.
- Use digital screens to promote our digital offering.
- Make technology available via “customer kiosks” with an upload facility to enable customers to quickly and securely upload and receive Council documents online to support channel shift to more cost effective and efficient channels.
- Technology will also be made available in outlying locations to deliver services in the community. This will include self-service computers and touch screen pods in existing public sector buildings such as libraries.
- Continue to develop the use of appropriate technology for staff that complete home visits to allow them to complete their work (e.g. assessments / online forms) while on the move.



Partnership Development Plan

Objective 4: We will collaborate with partners across public, private and voluntary sectors to support our customers to shift channels.



We will:

- Create digital networks to increase digital shift and awareness of our campaigns e.g. with Town and Community Councils, Community Groups, Voluntary organisations, and most importantly our residents.
- Explore opportunities to collaborate with partners such as the Citizens Advice (CA) for support with provision of specific customer services.

Payments Development Plan

Objective 5: We will encourage digital payments, moving away from accepting cash and cheque payments possible.



Whilst the objective is to move away from accepting cash and cheque payments, this combined with closure of specific CSCs will impact specific customers who may only be able to pay by these means. The Integrated Impact Assessment identified that elderly customers who prefer to pay in cash and customers on low incomes or with poor credit ratings who do not have access to a bank account that allows electronic payment would be impacted. These payments will continue to be accepted at Customer Service Centres in Haverfordwest and Pembroke Dock at the present time.

Alternative payment options following closures include:

- Direct Debits for Council Tax can be set up online at www.pembrokeshire.gov.uk/myaccount.
- Direct Debits for Council Tax, and other Council bills, can also be set up over the phone with Revenue Services. Arrangements must be made by the person responsible for paying the bill.
- Online payments can be made on our website at www.pembrokeshire.gov.uk/myaccount. Customers who pay online can also check their account balance, view the next payment date and set up payment reminders.
- Automated Telephone Line: This is an automated service, available 24 hours, 7 days a week and can be reached on 01437 775164.

- The Contact Centre can accept payments by credit or debit card 9am – 5pm Monday to Friday over the phone on 01437 764551.
- Payments will continue to be accepted at Customer Service Centres in Haverfordwest and Pembroke Dock, as these will remain open for the foreseeable future. Whilst cash and cheque payments can still be made at the remaining two customer service centres, customers will be told about other ways of making payments during their visits to encourage and support the digital shift.
- For customers who are unable to pay by any of the above means, a giro bank swipe card will be offered to pay their Council Tax or housing rent at a Post Office. We are currently looking at alternatives to this option.
- Floor walkers, digital screens and customer kiosks will be utilised to promote alternative payment methods.
- The Council's Financial Management System (including its Sundry Debtors System) is in the process of being replaced and a new system should be in place by October 2019. The new system should integrate better with service systems and will make it easier for a greater range of services to be delivered online.



Hub Development

Objective 6: In the longer term, we will develop a single Customer Services Hub in Haverfordwest.

The intention to retain a customer “hub” recognises that there is always likely to be a number of more complex cases, or more vulnerable customers (e.g. customers with health issues such as cognitive impairments) where face-to-face transactions including payments will always be the most appropriate mechanism.

We will:

- Explore opportunities for integration of partner services into the Hub to make it a multi-agency facility. This will encourage inter-agency working, developing a ‘one stop shop’, which is more efficient for the customer and the organisations involved.



Marketing Development Plan

Objective 7: A marketing campaign will highlight our digital services

We cannot presume that just because we provide our customers with digital channels that they will use them. We need to proactively promote them by as many means as possible.

We will:

- Target customers that are likely to take up the service through the effective use of Customer Insight data.
- Utilise town and community councils for promoting our digital marketing packs.
- Continue to increase social media engagement

Customer Insight Data Plan

Objective 8: We will use data intelligently to understand what is working well and what needs to change.

In order to deliver an effective strategy, we will need to collate, analyse and learn from transaction and customer feedback. Customer insight data includes Council systems data,

front line staff data, surveys and consultation, complaints and compliments and local media cover.

We would expect a movement in the numbers of users from one channel to another, the “channel shift”, with the majority of customer interactions eventually being digital transactions.

Customer insight information will help to monitor and identify movement from one channel to another, provide information to develop and improve services, provide a picture of how customers view our services and shape the pace and direction of future development.

We will:

- Monitor channel shift uptake and measure customer satisfaction in relation to our digital provision. This will be a fundamental part of shaping our My Account service.
- Move towards a ‘single view’ of a customer by ensuring our My Account service is fully integrated with our CRM and other back office systems.
- Listen to our customers to make sure our My Account service is developed with the user in mind and provides a simple, accessible and effective digital experience that encourages channel shift.
- Improve and expand our notification options to enable customers to opt-in for location specific information, warnings, service alerts and reminders to increase our digital communication with customers.
- Make more use of geographic information to enable customers to search and view information in an easy and accessible format.
- Enable customers to track the progress of their application, report or enquiry, using a unique tracking code generated on submission of their request, and notify customers of status changes by email/SMS.
- Monitor issues of culture, reputation and process impacting on customers.
- Learn from the commercial sector as to how they have encouraged channel shift with their customers.
- Utilise behavioural insights to help understand the behaviour of customers in order to better manage demand for services.

(Behavioural Insights is an approach based on the idea that interventions aimed at encouraging people to make better choices for themselves and society will be more successful if they are based on insights from behavioural science, also known as “nudge theory”).



Customer Charter

In order for the channel shift strategy to be a success it must clearly link with the level of service that customers can expect, whichever channel they choose to use.

Our current [Customer Charter](#) underpins our customer services and describes the basic standards of service that customers can expect from the Council.

Within our Customer Charter the term “customer” relates to all residents and visitors who use the services we provide.



Transforming our customer service delivery will, undoubtedly, impact on the standards of service outlined in our Customer Charter. It is important that these changes and their impact are considered and that the current Charter will be reviewed and updated appropriately.

Channel Shift Key Milestones within the life of this strategy

Key Milestone	Responsible Officer	Target Completion Date
Closure of Fishguard, Neyland and Milford Haven Customer Service Centres.	Head of Procurement and Customer Services	Completed 30 June 2019
Pembroke Dock and Haverfordwest (North Wing), the two largest CSCs, will remain open whilst a channel shift strategy is developed and implemented.		-
Decision on the future of Tenby Tourist Information Centre	Head of Procurement and Customer Services	30 September 2019
Implementation and launch of new MyAccount	Digital Services Manager	October 2019
Implementation and launch of new Financial Payments Systems	Director of Resources	October 2019
Closure of Pembroke Dock Customer Service Centre	Head of Procurement and Customer Services	Within the life of this strategy
Customer “hub” based in Haverfordwest	Head of Procurement and Customer Services	Within the life of this strategy

