



Draft Digital Customer Service Strategy 2023-2025

Version for Consultation August- September 2023

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1. Introduction

Digital technology has, and is continuing to change the way people live, connect and work. The Covid-19 pandemic has seen resident and customer expectations shift. Digital technology has evolved significantly and for most of us, digital technologies have become an essential part of our lives and we all want easy access to joined-up information and efficient secure services in the palm of our hand.

People increasingly expect to interact with organisations wherever they like, whenever they like, on whichever device they have and on whatever channel they choose. With customer behaviour changing faster than ever, the task of digital transformation demands significant changes to people, processes and technology.

In addressing this challenge our **vision** is to put the customer first, this means: constantly looking to improve the user experience and ensuring that the customer needs guide how services are developed and delivered; understanding and responding to customer communication preferences; taking into account the needs of people who may face barriers to using digital services, and balancing customer choice with efficient service delivery.

*To deliver this **vision** our **mission** is that: we excel at customer and digital service.*

In order to achieve our mission this strategy sets out **ten goals**, which cover all elements of digital customer service. For each of these goals we have explained the **outcomes**: the way we want things to be and our **priority actions**: the improvements that we will make to achieve these outcomes.

2. The link with our corporate plan

The council's corporate plan 2022-26 is the council's overarching strategy, setting out the council's vision and ambitions for Exeter and the outcomes it wants to achieve for both the city and the council. **The Digital Customer Service Strategy** is vital for the council's role in **leading a well-run council** and delivering **customer-focused services**.

Our corporate plan focuses on:

- Delivering our strategic priorities
- Prosperous local economy
- Healthy and active city
- Housing and building great neighbourhoods and communities
- Net zero carbon city
- Thriving culture and heritage
- Leading a well-run council

3. We excel at Customer and Digital Services

Our goals

1. A culture of excellent customer and digital service
2. Digital equality
3. Excellent customer and digital services
4. Prioritised, joined-up channels
5. One front door
6. Accessible information
7. Efficient Processes
8. Fit-for-purpose ICT infrastructure and systems
9. Well-maintained and secure data
10. Digital collaboration

Goal 1. A culture of excellent customer and digital service

Customer behaviour and technology are becoming increasingly complex and changing faster than ever. It is critical that our whole organisation understands what we mean by excellent customer and digital service, where we want to be and the outcomes we want to achieve.

Digital customer transformation demands a step change to the structures, systems, processes and technology that we use. Enhanced knowledge, skills, and experience of the digital world will inform our everyday values, attitudes and behaviours. We can then change how our customers act, and act differently ourselves.

Our outcomes	Our priority actions
Our staff and members understand our digital customer service strategy and its outcomes. These inform the design of their work, putting customers and digital at the forefront of everything we do.	We will run awareness (cultural change) sessions on our digital customer strategy for all staff, highlighting and explaining expectations and how they can contribute through behaviours, systems and ways of working.
Our members and staff have the knowledge and skills to plan, resource and deliver a first-class customer service.	We will provide a programme of training tailored to the needs of staff and members.
Our organisational structure and the allocation of our resources enable our digital and customer service outcomes.	We will ensure that this vision and mission is embedded in to our organisational change plans.

Goal 2. Digital equality

A lack of digital skills and access can have a huge negative impact on a person's life, leading to poorer health outcomes and a lower life expectancy, increased loneliness and social isolation, less access to jobs and education.

It can mean paying more for essentials, financial exclusion, an increased risk of experiencing poverty. People who are digitally excluded also lack a voice and visibility in the modern world, as government services and democracy increasingly move online. Some people are already getting left behind: for example 20% of the population lack basic skills and 37% of the over 75's face some form of digital poverty.

A comprehensive understanding of the scale of digital inequality in Exeter is critical to achieving our digital customer service goals.

Our outcomes	Our priority actions
Members and staff understand the scope and scale of digital inequality in Exeter and we work with communities and partners to address digital exclusion and inequalities so that everyone can benefit from digital opportunities.	We will commission a report from experts to get insight and data to better understand digital inequality in Exeter. We will implement a plan to address the issues that we discover. We will increase our training around disabilities and diversity to help our staff deal with all customers more effectively.

Goal 3. Excellent customer and digital services

To excel at customer and digital service our digital services need to be so good, convenient and well-known that people prefer to serve themselves. To make that happen, and to ensure that we extend our offer, we will focus on these 7 aspects of digital services:

1. Standards of service
2. The customer experience
3. Virtual assistance
4. Proactive digital communication
5. Problem resolution
6. Personalised digital services
7. Promotion and marketing

Our outcomes	Our priority actions
Standards of service: We understand what excellent digital services means to our customers and we meet these standards.	We will publish a Customer Charter setting out the standards that customers can expect across all our services, monitor our performance and continuously improve.
The customer experience: We listen to customers to improve existing services and to design excellent new services.	We will routinely analyse customer, data and feedback and use these insights to ensure to inform how services develop.

Our outcomes	Our priority actions
Virtual assistance: The customer experience is improved by the use of virtual assistance technology (also known as a digital assistants) which answer questions and process simple and routine tasks without human intervention.	We will work with recognised industry experts to identify how we can use virtual assistance in our digital services and learn from proofs of concept to ensure we understand the business and customer benefits prior to wholesale change.
Proactive digital communication: Customers receive pre-emptive and proactive communication, which keeps them updated about issues, appointments and progress so they don't need to contact us.	We will explore and test out how we can use digital channels e.g. email, text, chat, apps for proactive communication and make content and information available in formats that are accessible to all.
Problem resolution: Customers can keep track of their requests to the council and access frequently-used services and information by logging into their customer account.	We will continue to review our contact us/complaints process to ensure that the digital solution is working effectively for customers.
Personalised digital services: We will assess the ongoing requirements for, the business benefits of, and the advantages for customers of customer accounts and implement the optimum solution.	We will assess the ongoing requirements for, the business benefits of, and the advantages for customers of customer accounts and implement the optimum solution.

Goal 4. Prioritised, joined-up channels

Covid-19 rapidly and dramatically changed the ways in which we deliver, and customers prefer, to access our services. We now have limited face-to-face contact in our customer service centre with customers contacting us by phone and email and using more online services. However, we still deliver services through numerous, often disjointed channels such as emails, phone, videos, face to face, website, apps and multiple first contact points by multiple means. Most people want to do business with us online 24/7 and the majority use their mobile phone. Too many contact points is confusing, inefficient and difficult to monitor.

We need to prioritise digital channels, reducing the number of contact points into the council, and create more streamlined access routes driven by customer preference, costs, new technology and the need to spend more personal contact time with those who need extra support.

Our outcomes	Our priority actions
The majority of customer enquiries and transactions are handled through digital channels and demand for other forms of contact (face-to-face, telephone and email) is continually reducing and is mainly for specialist or complex enquiries.	We will design services, so that digital becomes the channel of choice, providing staff with the time and skills to deal with specialist and more complex enquiries.
Our contact centre offers a choice of channels, but the relevant information follows the customer across channels and interactions, so	We will assess the capability of our line of business and customer relationship management systems, to deliver a seamless customer and staff experience.

Our outcomes	Our priority actions
we retain the full history and context of customers' enquiries.	

Goal 5. One front door

We want to build on the work we have started to make contacting us as simple and easy as possible. We currently have a complex network of contact points. A limited volume of face-to-face contact is directed to and handled in our customer service centre, but we also have:

- A central telephone contact centre and switchboard
- Multiple mini contact centres dispersed across the council
- Multiple internal telephone contact points and email addresses published on our website

Our outcomes	Our priority actions
Our single customer services function with the knowledge and skills to resolve enquiries at the first contact point across all channels, with the ability to enable customers to easily access specialist support.	<p>We will:</p> <ul style="list-style-type: none"> • Design services so that customers get to the right place, first time. • Train staff to gain the skills, to resolve enquiries at the first point of contact and, where this is not possible, to efficiently enable customers to the right place/person
Customers can contact us easily via a single point of contact without having to navigate multiple, complex contact points.	<p>We will:</p> <ul style="list-style-type: none"> • Increase the proportion of contact handled by our professional contact centre function • Reduce the number of published contact routes • Enhance our online 'Contact Us' and central telephony services, to simplify and improve the user experience • Join up services for a seamless customer experience
Staff use joined-up technology so that they can view and update a single customer record to handle the majority of customer enquiries and review records of customer transactions across multiple services, avoiding the need for handing off to others.	We will upgrade the capability of our customer contact systems to deliver a seamless customer and staff experience.

Goal 6. Accessible information

Many customers contact us with simple questions, the answer to which is often available on our website but may not be easily found so people phone or email us because that is often the easier

option. We need to ensure that customers can find information quickly and easily - in the format that they need, using a device of their choice e.g. phone, tablet or PC.

To comply with the law and to support our digital inclusion goal, we must also ensure that our information is in an accessible format. This means more than putting things online. It means making our content and design readable and clear and simple enough so that most people can use it without needing to adapt it, while supporting those who do need to adapt things.

Our outcomes	Our priority actions
All customers can serve themselves on any device by finding, or being directed to readable, accessible, accurate and up-to-date online information.	We will: <ul style="list-style-type: none"> • Redesign the content of our website to ensure that our published digital information is readable, accessible, accurate and up-to-date • Improve our staff’s knowledge and skills in writing readable (Plain English) digital content and accessibility requirements
We will be open and transparent and publish data and information. Performance is regularly reported to the public to ensure that citizens are informed of the quality of services being delivered.	We will: <ul style="list-style-type: none"> • Publish and implement a Data Strategy

Goal 7. Efficient processes

Across the council we have thousands of processes to deal with customer enquiries. Many of these have been automated through the removal of paper, the use of digital forms, digital databases and fast, computerised data processing.

But we know that many of our processes can be confusing and disjointed for customers and not comparable to the streamlined, fully digital processes that we use in our everyday lives when banking, booking holidays or buying goods and services.

Our outcomes	Our priority actions
The number of processes is reduced, or they are streamlined, paperless and automated so that it’s simple for customers to complete a transaction (apply for something, pay for something, book something) and more efficient and cost effective for the council.	We will: <ul style="list-style-type: none"> • Start with the customer when reviewing and designing our processes • Ensure our processes are as effective and efficient as possible by automating routine steps and removing inefficient manual (human) processing • Aim for processes that are automated from beginning to end • Remove paper transaction and communication

Our outcomes	Our priority actions
	<ul style="list-style-type: none"> Explore the use of artificial intelligence, robotics and digital signatures and develop proofs of concept.

Goal 8. Fit-for-purpose ICT infrastructure and systems

ICT infrastructure and systems are critical to the delivery of this strategy and are central to all aspects of this work. We have three essential principles that underpin our approach:

- 1. Move from paper based (analogue) to digital** - digital technologies will be used to transform business operations.
- 2. Migrate to the cloud** - the delivery of computing services—including servers, storage, databases, networking, software, analytics, and intelligence—over the Internet (“the cloud”) for improved collaboration, faster innovation, flexible resources, enhanced resilience and economies of scale. This will enable us to add new systems at pace, reduce service disruption and integrate communication channels in a single customer platform
- 3. Introduce a single view of the customer** – replace multiple customer platforms with one that has sufficient breadth and depth to enable deployment of new innovations in a rapid and agile manner. Ensure a single measurable view of the citizen and their journey and incorporate communication tools (e.g. emails, chat, apps, video etc.) to connect both front and back-office and provide personalised responses to customers

Our outcomes	Our priority actions
<p>Our staff and members have access to continuously improving digital technology, with the skills and confidence to use it well, helping them deliver great services to residents as efficiently as possible.</p> <p>Our ICT infrastructure and systems operate in line with our essential principles:</p> <ol style="list-style-type: none"> 1. Move from analogue to digital 2. Migrate to the cloud 3. Introduce a single customer platform 	<p>We will work with Strata, our ICT partner, and our partner Councils, to create a plan for ICT that enables the goals of our Digital Customer Service Strategy and our three essential principles.</p>

Goal 9. Well-maintained and secure data

We hold significant amounts of customer data and information in numerous systems to enable us to deliver our services. As we rely more on digital interaction it is vital that this is properly governed to ensure its currency, security, confidentiality and integrity and to mitigate the risks of cyber security breaches and unauthorised sharing.

Our outcomes	Our priority actions
<p>Our systems and data are secure and protected from cybersecurity breaches and unauthorised sharing.</p> <p>Customers are confident that any information provided to the council will be kept safe and secure.</p>	<p>We will:</p> <ul style="list-style-type: none"> • work with Strata our ICT partner to ensure that our systems are regularly tested to identify any vulnerabilities and mitigate any risks • Ensure staff are aware of our information security policies and procedures and how to mitigate the risks of cyber security breaches
<p>We use data to review and continuously improve our digital services.</p> <p>Our data is organised and maintained in line with best practice.</p>	<p>We will implement a strategy for protecting and managing sensitive and business critical data so that:</p> <ul style="list-style-type: none"> • We know where our business critical and sensitive data resides and what is being done with it • We have control of this data as it travels inside and outside of the council • We use technology to classify, label, and protect this data • We use our data to inform decision making and improvement

Goal 10. Digital collaboration

The majority of our office-based staff are able to work effectively from anywhere as a result of our 2019 Agile and Flexible project which enabled us to switch, virtually overnight, to a home working model during the COVID 19 pandemic.

Microsoft 365 will underpin our digital transformation and will enable us to collaborate more effectively and provide the tools to support our staff, improve the way we work, the customer experience and business efficiency

Our outcomes	Our priority actions
<p>As a Microsoft 365 house we will use digital collaboration tools to work effectively internally and with customers and partners to promote more open communications and making use of shared data and digital platforms.</p>	<p>We will compile a detailed implementation plan for a cross-council roll out of Microsoft 365, which optimises the opportunities for breaking down silos and using tools to achieve our digital customer service goals.</p>

4. Our approach to improvement

As we constantly look to improve the customer experience and implement the priority actions in this strategy, we

will take a consistent, robust and analytical approach to change. Co-producing proofs of concept with customers and staff and trialling solutions at low cost will be key before we introduce wider solutions.

Analytical Approach

- What do our residents expect?
- What do we need to achieve?
- Why do we do it that way?
- What do others do?
- What can we stop doing?
- What are the real risks?
- What is the business case?

5. Checking and measuring progress

Our vision and mission is ambitious, and we need to ensure that we check and measure our progress across the lifetime of the strategy.

The goals, outcomes and priority actions in this strategy will be captured in a detailed action plan, including timescales, resources and quantitative and qualitative measures of success. These will include:

Feedback from Customers:

- Customer surveys
- Public consultations
- Focus groups with communities of interest and minority groups
- Feedback from compliments, complaints and enquiries

Feedback from staff:

- Staff Sounding Board
- Responses to compliments and complaints
- Annual staff surveys
- Growth and Development Reviews

Feedback from data will include:

- Web analytics
- Analysis of compliments and complaints
- Contact volumes and channels
- Analysis of themes and trends
- Service measures (key performance indicators and service level agreements)
- Mystery shopping