

Mid Devon District Council

Channel Access Strategy 2018 – 2021:
Creating Efficient Customer Channels to our Services

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Amendment History

Version	Date	Name	Description
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1 Executive Summary

1.1 Channel Access strategy

Mid Devon District Council (the Council) is a small district council, providing services for approximately 79,900 residents and 2,671 businesses. In 2014 the Council wished to define a strategy, focussing on “putting the customer first” and encouraging channel shift. This revised strategy focuses on improving the quality of the customer’s experience, encouraging channel shift, reducing business process waste and avoidable contact whilst embracing “Digital and Business Transformation”.

Services need to be available through appropriate and cost effective contact channels designed with the needs and preferences of our customers in mind. Customers will be encouraged to use the most effective contact method, by creating a series of deliberate and targeted channel shifts. This will not discriminate against any individual by limiting the choice of contact method available.

The format of this strategy leads with an executive summary, including all key recommendations and the remainder looks in more detail at each of the customer access channels.

1.2 Key Success Factors

The key success factors of an effective channel access strategy are:

- **Commitment to change** – to re-think how we transact with all customers end to end, improve customer service and business processes, align back office process and staff to customer needs and provide a professional customer service while enabling reduction in cost.
- **Detail** - the deliberate design of the channel access strategy and business process for **each type of service**, bearing in mind the level of human interaction required and the needs of the targeted customer base.
- **Constant review** - of the effectiveness of the channel access strategy for each type of contact bearing in mind changing technologies and changing customer habits.
- **Simplicity** – the optimum channels for the organisation should be the easiest to use for the customer to drive a shift in customer behaviour.
- **Inclusion** – no group should be denied access to a service because of disability, language or cost of the access channel (e.g. mobile phone costs, broadband access). Options should be made available other than the organisation’s preferred method of contact.
- **Cost effectiveness** – particularly in the current economic climate, finding ways in which to deliver services effectively but at lower cost is increasingly important.

1.3 Key Recommendations

The key recommendations contained in this strategy are:

1.3.1 Digital and Business Transformation priorities

1. To maintain a robust website Content Management System (CMS) ensuring all content is focused on the needs of the customer, has simple easy to use transactions and provides a solution for mobile and tablet users.
2. Provide a single customer focused approach to all access channels so that customers are able to contact and transact with us in the most effective ways.

3. To promote the website or any customer portal as the main access point for the council's services for information and transactional services and provide mediated access through our face to face and contact centre staff.
4. To develop effective use of social media for engaging with our customers and communities.
5. To provide access to the internet and Wi-Fi in our offices.
6. To enable mobile working for staff.
7. To improve and extend use of the Document Management System (DMS) to support self-service and mobile working.
8. To develop action plans with all services for digital and business transformation, that reduce cost, increase efficiency and support customer self-service.

1.3.2 Customer Insight

All decisions and recommendations made throughout this strategy have been focused on the needs of our customers. An exercise was carried out to develop personas for MDDC. Details are available in the Business Improvement pages on SharePoint.

The transformation programme will involve engagement with all services to ensure the benefits of understanding customers are embedded in the redesign of services and that further customer journey mapping takes place to maximise the efficiency of our services.

1.3.3 Channel and Organisational Insight

From data currently available an exercise should be undertaken to identify the number of interactions per access channel and to formulate a cost per channel so decisions can be informed of where to most effectively channel shift interactions and prioritise the digital and business transformation programme. This will also inform workforce planning and identification of where resource and training needs are required. See graphs at page 9

1.3.4 Avoidable Contact

The re-design of services must reduce the need for our customers to contact us by reducing red tape, automating processes and working with partner authorities to provide "joined up services". To ensure continued improvement we will:

- Establish a permanent Business Improvement Team to analyse data from our main customer access channels to look for opportunities to reduce the need for citizens to make unnecessary or multiple contact with the authority
- Improve the number of customer queries that we are able to resolve first time face to face, on the telephone and on line by improving our back office processes
- Broaden scope outside the organisation to actively look at end-to-end process opportunities to eliminate contact

1.3.5 Channel Shift

To design cost effective, efficient and user friendly means of contacting the council and then encourage our customers to use the channels that work best for them. All new services including information services will be designed around the user for 24/7 web access first wherever possible, ensuring all channels have access to the same customer information to accommodate 'channel hopping' and provide staff with a view of customer transactions that helps them to accommodate the customer needs.

1.3.6 Digital Inclusion

To ensure that citizens who do not have access to digital channels at home or work are not disadvantaged when communicating with the council we will:

- Provide public internet access at our key locations, e.g. Leisure Centres, Council Offices and provide information on other available access in the area.
- Provide support and assisted access to our website at the council's face-to-face locations
- Widely advertise our full choice of contact channels.

1.3.7 Channel Strategies

1.3.7.1 Website

To provide a single, comprehensive, easy to access and up to date website and customer portal that allows customers to transact and interact with the council 24/7

1.3.7.2 Telephone

To minimise the number of contact numbers published, to provide access to a fully trained officer and to reduce the amount of irritating low value calls that our residents have to make chasing failed delivery of service or communication.

1.3.7.3 Mobile, Smartphone/Tablet

To use the emerging mobile phone technology in a tactical manner to provide better access to information for targeted user groups, to reduce costs, increase speed of communication or reduce direct contact

1.3.7.4 Face to Face

To maintain our Face to Face services, in the most cost effective locations by fully trained expert officers

1.3.7.5 Email

To reduce the amount of incoming email communications by better use of electronic forms and other electronic channels

1.3.7.6 Post/Paper

To reduce the amount of post and paper communication by better use of electronic channels, including increase in emailed communication and use of any customer portals

1.3.7.7 Social Media

To communicate and engage with customers and community groups on Social Media to promote the web channel

1.4 In Conclusion

Adopting and implementing the recommendations in this strategy will lay the foundations for the development of all the Council's customer access channels, with a focus on improving the quality of the customers' experience, encouraging channel shift and reducing waste and avoidable contact through "Digital and Business Transformation".

2 Channel Access Strategy

2.1 What is a Channel Access Strategy?

The Council has a responsibility to provide value for money to customers. The channels through which Council services are delivered and by which customers have contact with the Council, (be that via telephone, online, in person, or via other means), are a critical part of service provision, and there is an on-going impetus for them to be managed effectively and efficiently for everyone.

A channel access strategy is an organisation's plan for the channels it will use to deliver services to, and interact with, its customers. A channel access strategy explains how an organisation will meet the contact demands of its customers using the resources it has available bearing in mind the needs of the customer. However, a channel access strategy is **not** simply a plan to move service provision to online channels.

2.2 Why is a Channel Access Strategy Important

Customers receive a high standard of customer service from many organisations. To ensure the Council follows this route, the organisation must continue to raise its own standards of service across all the channels it uses and offers.

In order to meet the needs of customers, the Council must provide services that are:

- Easily accessible
- Simple to use
- Streamlined
- Convenient
- Cost effective
- Robust

It is also important to bear in mind the target audience's access to technology, the type and complexity of the contact, their personal preferences as well as their skill sets when selecting channels.

Rising internet use and customer expectations of accessing services online present an on-going opportunity for organisations. Competent online services are easy and quick to use, available whenever customers need them and have a relatively low administrative burden. Managed well, online access to services is a very effective channel with considerable benefits for customers and organisations.

The Council must however also meet the needs of people who do not (yet) have access to the internet. 'Digital Inclusion' therefore is a core element of any channel access strategy.

2.3 Purpose of a Channel Access Strategy

To outline the broad principles for the ways in which the Council will deliver its services through a range of contact channels that provide better value for money, are more accessible and are designed with the customer in mind.

2.3.1 The need for insight

The process of developing and implementing a channel access strategy needs to be guided by insight, and insight specifically relating to:

- The customer
- The services an organisation is providing and each service area in question
- The current delivery channels at the organisation's disposal as well as those that may be available or need to be used in future

It is also important to understand the wider online services market, as expectations of online services are driven by customer experiences of using similar services of other organisations.

2.3.2 Organisational challenge

In considering a channel access strategy, there is often a considerable challenge and change to existing organisational structures. A channel access strategy needs to become an integral part of the structure of the organisation and the way the objectives of the organisation are realised. It cannot be imposed or “made to fit” onto existing practices and as such is likely to require or precipitate considerable organisational change.

We also need to recognise that people will use different channels not just for different types of interactions, but also to suit their own convenience.

2.4 Scope

1. This strategy document sets out the basic principles by which the Council will deliver its services to its customers through the contact channels currently available.

Contact channels in scope include:

- Face to face
- Email
- Internet/Website/Portal
- Social media
- Telephone
- Mobile technology (including SMS text messaging, apps and mobile web)
- Automated telephone technology
- Post

2. This document focuses on three key types of contacts between the Council and its customers
 - **Transactions** (e.g. reporting a repair or paying a bill)
 - **Interactions** (e.g. obtaining advice)
 - **Information** (e.g. exploring available properties)

2.5 Channels Hierarchy and Design Principles

The choice of contact channels available to customers is growing all of the time as new technologies are developed and released. For example in the last 10 years we have seen the emergence and growth of channels such as social media (Facebook and Twitter), mobile internet, interactive TV and mobile phone applications (apps).

Without a channel access strategy many organisations typically adopt one of two approaches to using these channels by either 1) launching all of their products and services on all new channels without much thought to the relevance and cost of doing so or 2) focusing on switching their customer contact to the cheapest channel (often assumed to be the internet) without much thought as to the relevance of this channel to their entire customer base.

The key factors to an effective channel access strategy therefore are:

1. **Commitment to change** – The organisation must understand that this is about changing the way we work to ensure there is a seamless relationship between the customer, frontline staff and the back office process
2. **Detail** - the deliberate design of the channel access strategy for **each type of service**, bearing in mind the level of human interaction required and the needs of the targeted customer base
3. **Review** – the constant reviewing of the effectiveness of the channel access strategy for each type of contact bearing in mind changing technologies, channel hopping and changing customer habits
4. **Simplicity** – the optimum channels for the organisation should be the easiest to use for the customer to drive a shift in customer behaviour
5. **Inclusion** – no group should be denied access to a service because of disability, language or cost of the access channel (e.g. mobile phone costs, broadband access). Options should be made available other than the organisation's preferred method of contact.
6. **Cost effectiveness** – particularly in the current economic climate, finding ways in which to deliver services effectively but at lower cost is increasingly important.

3 Customer Insight

A key focus during the development of this strategy was to build an understanding of who the customers of Mid Devon District Council are and how they interact with the Council, so plans can be developed to channel shift as many interactions as possible to the cheaper channels.

A persona is a realistic but fictional character that represents one segment of the Council's target audience. The Personas developed were based on the Council's demographics and can be seen in the Business Improvement pages on SharePoint.

Key observations when developing the Personas and interacting with the Services at the Senior Management Engagement workshop, included:

- Highlighted different needs of the customer, important to understand local needs (one size does not fit all)
- One point of contact, simple to contact regardless of access channel used.
- Alerts on changes to services or planning notices
- Mixture of methods customers need to use - depends on the type of enquiry
- Potential for use of live chat (on line web tool)
- More services available online, booking and reporting etc.
- Some customers will never change / be on the internet, so must be able to support them
- Effective signposting is very important
- Simplify the website
- Provide joined up information from across services and organisations
- Need for effective Online payments
- Channels that suit customers varied lifestyles

3.1 Recommendations

Engage meaningfully with customers and services to ensure the benefits of customer insight are embedded in the redesign of services.

4 Channel Insight

It is important to bear in mind the Council's target audience's access to technology, the type and complexity of the contact, their personal preferences as well their skill sets when selecting channels.

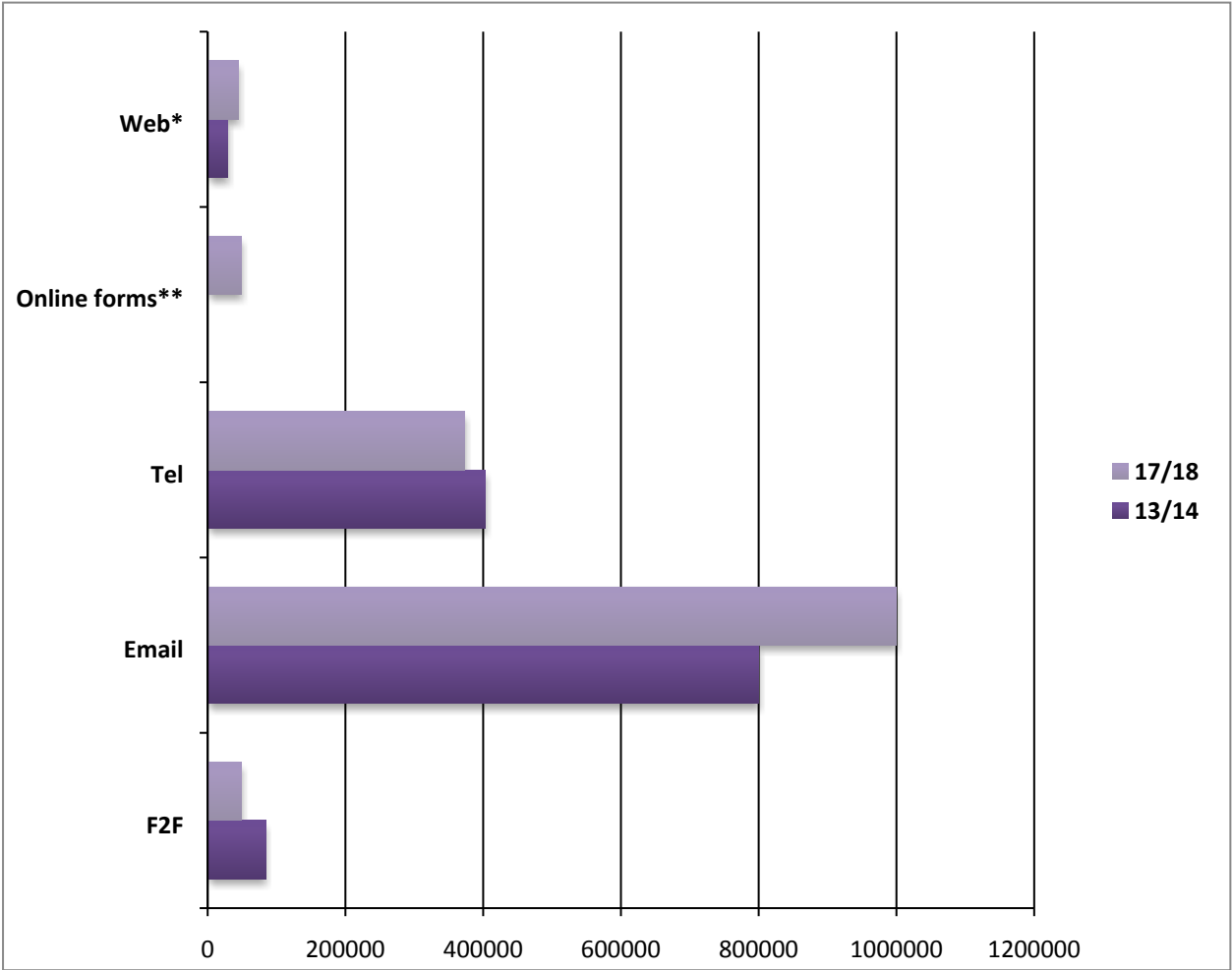
From the data currently available an exercise will be undertaken to identify the number of interactions per access channel and to formulate a cost per channel so decisions can be informed of where to most effectively channel shift interactions.

Customer interactions dealt with by service areas outside of Customer Services are logged on a number of different systems, some manual, and to a varying degree of detail. Data will need to be collated from these services and analysis will be required when delivering this strategy. The data collected so far does however highlight areas with a high volume of interactions and where the greatest savings may be possible.

The costs used for each channel are those identified nationally by SOCITIM. Focusing on end to end process improvements will reduce channel costs and ensure efficient service delivery.

Customer journey mapping data capture exercise.

Mid Devon transaction recording showing totals by channel

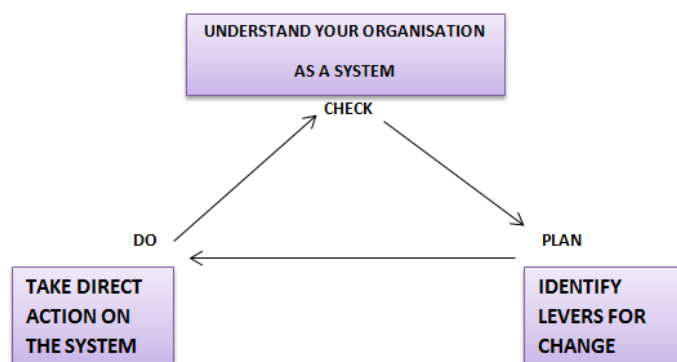


- *Web hits – numbers are from 16/17 and 17/18 – data not available prior to this.
- ** Web forms – data is for 17/18 only

5 Organisational Insight

Successful business transformation is about People, Process and Technology. No one element should become more important than the other. Only when each component is working cohesively will the business truly achieve improvement and benefits realisation.

An understanding of the organisation at a holistic level is therefore required. What is the organisation's purpose? Who does it serve? What are the component parts?



Also understanding the complexity of customer need/journeys, measuring their activities, identifying the working and digital silos and the barriers these put in place between services and customers is pivotal to redesigning effective services.

Business Intelligence should form part of any attempt to transform or improve services. This understanding of our customer's need and our organisational function will then enable Mid Devon to resource the business efficiently and economically.

However, people are our most valuable resource. To ensure change is successful and delivers the customer service and business improvements required the organisation will be required to invest resources in achieving the following:

- Ensure HR Business Partners are included in each service review to support staff
- Where applicable remove digital and working silos and provide opportunities for staff to experience different service provision to broaden their skills
- Carry out a skills audit on staff to understand our most valuable resource
- Ensure the competency framework is aligned to organisational need
- Align workforce planning with service reviews to ensure staff are in the correct location and post to deliver the service
- Include staff at varying levels of the organisation are involved in service reviews
- Remove fear of change by open and transparent communication about what is happening
- Ensure a communication plan is in place at organisational and service level to facilitate change
- Provide access to training for staff
- Ensure managers are skilled in coaching and mentoring to assist staff through change

6 Mid Devon District's Channel Shift Strategies

6.1 Website

To encourage channel shift we must provide a cost effective, efficient and user friendly website that is available for customers to use at a time that suits their needs and that they are confident to use. An important part of this strategy will be to encourage customers to use the new channels if they are suitable for their needs.

1. Promote the website as the main access point for the council's services.
2. Provide Wi-Fi and public access in our offices to assist customers to use self-service options.
3. Use marketing and communications expertise to direct customers to the website and on line services.
4. All new services will be designed around the user for 24/7 web access first wherever possible.
5. Ensure customers have access to the same information regardless of the channel they chose to contact us.

More details on our website strategy are at item 6.1 of this document.

6.2 Digital Inclusion Strategy

To ensure that citizens who do not have access to digital channels at home or work are not disadvantaged when communicating with the council

1. Provide public internet access at our key locations, e.g. Leisure Centres, Council Offices and provide information on other free access available.
2. Provide full mediated access to our website at the council's face-to-face locations and over the phone.
3. Widely advertise our full choice of contact channels, particularly for hard to reach groups, e.g. transient and socially excluded groups.
4. Never design a service that is available only through digital channels
5. Provide staff training to ensure they have the skills to support customers using digital transactions.

6.3 Accessibility of Contact Strategy

To provide a full range of contact channels for each of our services, with some channels providing enhanced access for customers with special requirements.

1. Continually engage with groups representing those with specific requirements for the way they contact us and ensure that an appropriate choice of channels is available to those individuals
2. Ensure that we widely advertise our choice of contact channels, particularly hard to reach groups, for example young people or vision impaired customers
3. To provide a comprehensive translation service to allow easy access to the authority for all through the face to face and telephone channels.
4. Provide disabled access to our buildings
5. Provide induction loops within our main offices for customers with impaired hearing.
6. Investigate the use of "live chat" to assist customers using our on line services.

7 Strategies for Specific Channels

7.1 Website Strategy

To provide a single, comprehensive, easy to access and up to date website that allows anyone to transact and interact with the council 24/7

1. Maintain our website using Umbraco open source technology or similar, allowing greater flexibility to update and amend the website to reflect changes in services, technology and customer requirements.
2. To increase and improve on line forms to make them the channel of choice for simple, effective transactions that will encourage channel shift.
3. Use analysis of transaction failures to improve the website and on line functions.
4. Maintain a pool of key staff to update the website to ensure the site is always up to date.
5. Ensure that business cases for improvements reflect both increased public satisfaction, but also reduce contact centre and officer time and effort in providing mediated access.
6. To provide appropriate intuitive map based interfaces to both transactional and information systems
7. To integrate, where possible, all online transactions directly into back office systems to prevent double entering of information.
8. Remove telephone numbers and email addresses for individual officers, to reduce the need to update pages and ensure access to services is via one agreed point of contact.
9. To ensure that all council leaflets and literature are made available via the website in order to reduce printing, cost and environmental impact
10. To ensure that all communication is replicated on the council's website
11. Provide "open" datasets online in order for interested parties to create their own interfaces and combinations increasing transparency
12. Constantly review and respond to feedback to improve the website

7.2 Telephone Strategy

To minimise the number of contact numbers published, to provide fast access to an expert officer and to reduce the amount of irritating low value calls that our residents have to make

1. To provide one main phone number for the organisation which can be easily found in order to make contacting the council straightforward for our residents
2. Provide an automated telephone system for payments
3. To use local rate phone numbers wherever possible to make contacting the authority cheaper on "pay as you go" mobile phones
4. To constantly improve the number of customer queries that we are able to resolve first time on the telephone
5. To use telephone call data and customer feedback to identify areas of improvement within the council and work to eliminate red tape, process failure and unnecessary cost to the public
6. Wherever possible, use the public website to transact in our Customer Services Centre to ensure that the site is fit for purpose for our residents and the same service is provided across the various access channels

7.3 Mobile Strategy

To use the emerging mobile phone technology in a tactical manner to provide better access to information for targeted user groups, to reduce costs, increase speed of communication or reduce direct contact.

1. To provide access to council telephone based services using only local rate telephone numbers to ensure the minimum costs to mobile phone users, particularly on “pay as you go” tariffs
2. To use outbound text messaging to confirm appointments, chase payments and advise of items of interest
3. To develop new inbound and outbound text services, this can also be used for hearing impaired customers.
4. Provide a mobile/tablet rendered website.
5. Provide mobile solutions for staff to improve access to information on site visits reduce inefficiencies and remove double handling of data.

7.4 Face to Face Strategy

To maintain our Face to Face services, but to provide these services in more appropriate and cost effective locations by fully trained expert officers

1. To seek opportunities to share face to face provision with other organisations
2. To provide mediated access to the Council website through our face to face staff and assist customers to use self-service.
3. To undertake process reviews to identify potential channel shift and quality improvements to our face to face service.
4. One and done approach
5. Provide Wi-Fi access in our main offices and leisure centres and provide information on other public access facilities.

7.5 Email and Online Strategy

To reduce the amount of email communication by better use of electronic forms and other electronic channels

1. To provide a complete range of online forms to minimise the amount of emails handled
2. To encourage use of outgoing e-mails to communicate rather than phone and post.
3. Email alerts for changes to expected services.
4. To provide status updates for any transactions that are started on the web but cannot be completed online – for example reporting a fault

7.6 Post/Paper Communication Strategy

To reduce the amount of post and paper communication by better use of electronic channels

1. To provide a complete range of online forms to minimise the amount of post handled
2. To place more of our leaflets and information online in order to minimise printing and reduce our environmental impact

3. To integrate email and postal distribution lists in order to give people the choice to opt for email only
4. Use DMS for all paper correspondence to support mobile working and customer self service
5. Use second class post as our main postal tariff
6. Use external print/post mail companies to maximise post discounts.

7.7 Social Media Strategy

To communicate and listen with customers on Social Media to promote the web channel

1. Develop our use of Social media
2. Use a monitoring management tool to identify individuals to respond to

8 Performance Management and Governance

8.1 Channel Shift

- The Group Manager for Business Transformation and Customer Engagement will have the day to day responsibility for the Council's Channel Access Strategy and implementation activities. An annual report is provided to Members on complaints and this will include data on customer transactions and changing trends.
- We will compare the effectiveness and usage of different channels for each service and seek to shift contacts to the most appropriate channels

8.2 Website

- Customer Services will ensure that, through constant customer feedback and task based metrics the web content is always relevant, up to date and user friendly
- The "exit pages" and transaction abandonment on the website will be analysed each month to see where transactions are failing and corrections made accordingly
- ICT and Digital Services will ensure that the website is available and operational 24/7
- An officer web group will maintain overall service excellence as evidenced by customer feedback, industry awards and adherence to Local Government Digital Services Standards
- Obtain and maintain compliance with the upcoming European Union Web Accessibility Directive and "WCAG 2.0 level AA" rating for accessibility by all.

8.3 Mobile technology

- The Group Manager for ICT and GIS Services will have responsibility for the mobile phone strategy
- To monitor opportunities and take up rates of mobile technologies
- Performance and usage of this channel will be monitored as services are developed

8.4 Customer Service

- Individual service managers will be responsible for their own services and monitor performance against the standards set in the Council's Customer Care policy. The Group Manager for Business Transformation and Customer Engagement will monitor, review and update the Customer Care Policy.
- Our Corporate Induction process includes information on Customer care.

8.5 Digital and Business Transformation

- Business cases will be prepared to implement new technologies, processes or other activities to ensure the expenditure will result in efficiencies and savings to the Council. Any new systems must demonstrate a dual benefit, to the public, and in ease of use for staff to facilitate savings in time and efficiency for the Council.
- As a result of our digital and business transformation programme:
 - We will aim to reduce the volume of visitors to our offices, calls into our Customer Service Centre and Direct Dials by 20% over 5 years by moving these contacts to the web or other channels

- We will aim to improve processing times for high transaction services.
- We will aim to reduce the use of paper forms by 50% which will contribute to the reduction of:-
 - Printing costs , postage costs and stationary costs
- This strategy will contribute to overall efficiency savings