

WANDSWORTH BOROUGH COUNCIL

FINANCE AND CORPORATE RESOURCES OVERVIEW AND SCRUTINY
COMMITTEE – 26TH NOVEMBER 2014

EXECUTIVE – 1ST DECEMBER 2014

Report by the Director of Finance on further progress with implementing the Channel
Shift Strategy

SUMMARY

This report provides an update on the continuing work of the officers' Customer Services Working Group with regard to implementing the Channel Shift Strategy that was approved by the Executive in April 2012 (Paper No. 12-261). Progress was reported previously in January 2013 (Paper No. 13-76) and in January 2014 (Paper No. 14-43)

This report describes the progress made and the further work that is required in relation the Online First initiative, the establishment of a Corporate Contact Centre, the development of the Netcall telephony self service platform and the expansion of the Customer Services Centre.

The cost of the proposals within this report can be met from within existing budgets. Over time the move towards digital delivery of services should generate further savings to the Council.

GLOSSARY

OSC	- Overview and Scrutiny Committee
CSWG	- Customer Services Working Group
TUO	- Tell Us Once
MIMO	- Moving In Moving Out
SSO	- Single Sign On
CSC	- Customer Service Centre
FAQ	- Frequently Asked Questions
CCT	- Corporate Communications Team
FM	- Facilities Management
HITBC	- Head of IT and Business Communications
CIT	- Corporate IT
FIS	- Family Information Service

ACIS	- Adult Care and Information Service
EIA	- Equality Impact Assessment
ESS	Education and Social Services
DWP	- Department Work and Pensions
WIG	- Website Improvement Group
F2F	- Face to Face
CCTV	- Closed Circuit Television
VCA	- Vehicle Certification Agency
HCS	- Housing and Community Services

RECOMMENDATIONS

1. The Finance and Corporate Resources Overview and Scrutiny Committee (OSC) are recommended to support the recommendation to the Executive in paragraph 2 below. If they approve any views, comments or recommendations on the report, these will be reported to the Executive for their consideration.
2. The Executive is recommended to:-
 - (a) note the progress made on the Channel Shift Strategy as detailed in Appendix 1;
 - (b) note the progress of the Online First initiative and endorse to services the advantages of online service provision;
 - (c) agree to the refreshed action plan for the outstanding Online First initiatives as described in paragraph 11 and 12 and detailed in Appendix 3;
 - (d) note the implementation of a set of solely online standards by the Director of Finance and endorse the implementation of similar standards across other Departments as described in paragraph 13;
 - (e) agree to the proposals to use the Netcall system to progress the corporate contact centre implementation and to replace the current VoiceConnect system as it becomes necessary, as described in paragraphs 32 and 33;
 - (f) agree to the proposals regarding the use of “hotline” telephone numbers, including the publishing of one number for each service and the removal of all other telephone numbers from the Council’s website as described in paragraphs 35, 36, 37 and 40;
 - (g) agree to exclude all contact details including email and telephone number, from the “Contact Us” page and the interactive web forms currently being developed by CIT as described in paragraph 43;

- (h) agree that the use of web chat in the corporate contact centre is considered for implementation and also that the use of YouTube information videos is evaluated, as described in paragraphs 45 and 46; and
- (i) Agree to the proposed additional performance indicators referred to in paragraph 47 and detailed in Appendix 8.

BACKGROUND

- 3. The officer-level Customer Services Working Group (CSWG) meets regularly under the chairmanship of the Director of Finance with representatives from all departments to monitor the progress of various customer service initiatives that are underway across the Council
- 4. The central focus of the Group has been the Online First initiative incorporating the Single Sign On (SSO) project, the digitisation of mail across the Council and the implementation of a corporate contact centre supported by self service telephony software. Updates on all of these initiatives are given below.

ONLINE FIRST

- 5. Work continues across all Council departments to increase online take-up of key volume services with the aim of the strategy being to shift customers from existing means of contact such as face-to-face, telephone and letter, to self-serve using online services whilst maintaining customer satisfaction levels. Further benefits to the Council include a reduction in back office work where online services are integrated with back office systems.
- 6. The Online First initiative identified the steps needed to make further improvements to the online offer, or to initiate an online offering where there currently was not one, for a set of priority areas. Specific areas were identified as a priority initially by reviewing transaction levels and values and these priority areas were categorised into phase 1 and phase 2 of the Online First initiative.
- 7. Significant progress has been achieved in many of the identified areas which include:
 - Implementation of the Tell Us Once (TUO) Scheme;
 - Online reporting of missed bins, street cleansing fault, ordering of recycling sacks, book and pay for bulky waste collection;
 - Issue and process of Penalty Charge Notices, enforcement, challenges (including online), debt recovery, payments, back office scanning,

- reporting, removals and workflow management Moving In Moving Out (MIMO) online reporting form;
- Street defects online reporting;
 - Online school appeals form;
 - New webpages for Registrars and Nationality Checking Service; and
 - Procurement of a Single Sign On (SSO) system, details of which are given in paragraphs 14 to 15 below.
8. Additionally some progress has recently been made in relation to the Schools Admissions process, with paper application forms being removed from the booklet for the first time this year. Data analysis has been carried out to identify schools where online applications were lowest and consideration given as to how to work with these schools to increase the online take-up. The Pupil Admissions Team has included the promotion of the benefits of applying online at Open Evenings in schools throughout the Borough.
9. A regular update on progress within the priority groups is provided to the CSWG and a copy of the latest report detailing successfully implemented online initiatives is attached at Appendix 1.
10. Some of the identified areas are proving challenging to progress due to technical issues and these include: Housing repairs and Sport and Leisure book and pay. Additionally, technical issues surrounding the delivery of Civica ICON's pre-authorisation payment module and the CCTV set up, together with some changes to the design of the web pages has meant that there has been some delay in completing the implementation of phases 2 and 3 of the new Parking system. This work has therefore been prioritised with the new contractor and within CIT and a revised timetable detailing key delivery dates is attached as Appendix 2.
11. Work is continuing on the other areas identified within the two phases and, once completed, further areas will be prioritised as phase 3 projects. Many of these will underpin the work currently being undertaken with services to move telephone callers to self-serve or move non complex calls into the corporate contact centre.
12. To maintain momentum and further engage some services with the aims of the strategy it is proposed to update and re-focus the outstanding initiatives, details of which are given in Appendix 3
13. Additionally, in line with the proposals in Paper No. 14-24, the Director of Finance is implementing a set of solely online standards for services under his control which will be introduced to support the implementation of the SSO and which will be effective from April 2015. These will be introduced on the basis that other Directors will actively consider similar standards for their services for implementation by no later than 2015/16.

SINGLE SIGN ON

14. In line with the Online First initiative, the Single Sign On (SSO) project will deliver a customer portal to the Council's website that integrates with the highest volume transactions such as Council Tax, Benefits, street defect reporting and Parking Permits. The contract to supply this system has been awarded to Agilisys Digital as reported to committee in Paper No. 14-177.
15. The SSO service will be introduced in several phases, these being:
 - (a) Benefits view and Council Tax – November 2014;
 - (b) Benefits new application form – January 2015;
 - (c) Council tax Moving In Moving Out (MIMO) - February 2015; and
 - (d) Parking permits/Highways licencing - March 2015.
16. Other areas such as street defects will be scheduled early in 2015, once the initial areas have gone live. It is anticipated that the implementation of the SSO will generate the opportunity for staffing efficiencies which will be the subject of a future report to the Executive .

DIGITISATION OF MAIL SERVICES

INCOMING POST

17. Significant advancement has been made in the work to progress the roll out of a document imaging and workflow system across the Council. This system, supplied by Civica, deals with incoming correspondence and paperwork and provides workflow and document management. During 2013-14 the majority of services within the Council that receive significant levels of written correspondence and/or documentation have either moved to or are moving to utilising this system to deal with their incoming mail. Details of the services using or moving to the Civica W2 system are given in Appendix 4. Further analysis of incoming post is being carried out to ascertain what other areas would be good candidates for the implementation of the system.
18. The implementation of document imaging and workflow management allows services to review their post processes, eradicates the need for paper filing and significantly reduces the need for the storage of older paperwork. This has the benefit of making documents easier to locate, manages the workflow of documents and monitors the turnaround times and also reduces the requirement for storage and office space. Services affected by the office accommodation strategy are allocated a reduced amount of space for storage and this rationalisation of storage has made a significant contribution towards the overall objectives of the strategy- to vacate Welbeck House and 17/27 Garratt Lane by June 2015. The document imaging and workflow

management project is also reducing the number of new paper files that are being added to the archive in a store at Frogmore Depot.

OUTGOING POST

19. The Benefits Service has been piloting a Hybrid mail solution that provides offsite printing and mailing for individual outgoing correspondence. This is undertaken by the company that already provide the bulk printing and mailing service for several high volume transaction services within the Council. The benefits of this include a reduction in on site consumables (although there are increased charges by the printing company), reduced amount of office space allocated to printing machines due to less printers being required together with a small reduction in processing time as each letter no longer has to be collected, folded and enveloped. Additionally there is a reduction in the volume of post that requires collection and franking by the messenger/post room staff.
20. It is planned to extend this pilot into the Council Tax service shortly. If this pilot is successful the facility will be rolled out to the rest of the Council from the new calendar year.

DIGITAL MAILROOM

21. The logical conclusion to the work being done to digitise incoming and outgoing post would be to establish a completely digital mailroom where no hardcopy paper items need to be delivered to Council offices. Similarly, no paper items would need to be manually collected from offices prior to despatch. It may take a number of years to fulfil this aspiration but, in preparation, through the office accommodation strategy, the existing scanning and indexing bureau in the Finance Department has been relocated closer to the existing post room within the Town Hall so that the movement of hardcopy items can be minimised. In the process, the scanning and indexing bureau has been remodelled to allow future expansion as more services move onto the Civica W2 system.
22. The reduced need for mail rooms and mail delivery has been reflected in the specification for the tender of facilities management services. During the next nine months further work will be on-going on the scope for co-locating other departmental based scanning facilities with the main Finance Department facilities prior to the specifying and market testing of these services in late 2015 as agreed in Paper No 14- 517.

CUSTOMER SERVICES CENTRE

23. Since opening in October 2012 over 340,000 customers have visited the Customer Service Centre (CSC). The range of customers dealt with is more recently being expanded to include callers from both Putney Bridge Road and Welbeck House Reception points.
24. Due to the increased use of the customer self-service points within the CSC, and to accommodate the anticipated increase demand following the completion of phases 1 and 2 of the Online First initiative, the existing three online self-service points will be expanded to provide 12 points with facilities extended to allow customer to access relevant sites including the Pan London eAdmissions applications, Family Information Service (FIS), and Adult Care and Information Service (ACIS).
25. To support the expanded self-service facilities customer services staff will be made available as additional floorwalkers and will be on hand to assist customers in using the online facilities. Additionally all floorwalkers will have access to handheld tablets that will be used to book appointments, monitor and categorise the footfall and access general advice quickly. Furthermore the CSC is working with CIT to provide customer scanning facilities so that evidence documents and required proofs can be scanned in at the point of application and integrated into back office systems. This will provide a fully cohesive online service which it is anticipated will encourage the take-up of online services amongst customers that may have been reluctant to engage through these methods in the past, whilst maintaining a face-to-face service for customers that are unable to engage online.
26. The CSWG have also been involved in the planning of the new Housing reception facilities to ensure this replicates the look and feel of the CSC and also provides the same self service facilities and that corporate identity is maintained. As part of the office accommodation strategy, the new Housing reception will be created within 90 Putney Bridge Road. Work on this reception point is planned to start in January 2015, with completion programmed for April 2015 This will permit the relocation of the whole department from 17/27 Garratt Lane by June 2015 as required for the proposed development of the South Thames College site (Paper No. 13-460).

TELEPHONES

CONTACT CENTRE DEVELOPMENT AND SELF SERVICE

27. Development of the contact centre to include services within the Administration and Finance Departments that receive a high volume of calls is proceeding. Currently the contact centre incorporates the switchboard service and handles calls for enquiries relating to council tax and benefits, parking

and waste management. Work is continuing to move the other identified services within the Administration and Finance Departments from March 2015. Sampling of the calls taken by these services, which include Registrars and Nationality Checking Service, Environmental Services and Electoral Services is planned or underway. A timetable for the transfer of these calls into the contact centre is given at Appendix 5.

28. Following this, as agreed in Paper No 14-24, consideration was to be given to other departments following a similar approach using the outcome of the proposals for the Administration and Finance Departments as a basis for their future review, Appendix 6 refers.
29. To support the move to a contact centre approach, the use of self-service telephone options that integrate directly into back office systems is reviewed at the point that the scoping work is planned. This is carried out together with a review of the webpages and also considers areas that could benefit by inclusion into the Online First Initiative. This means that where reviews are completed it will be possible to assist services to reduce the number of telephone calls dealt with whether or not a decision is made to move to a call centre approach. This work will need to be completed by September 2015 to advise and inform the specification for the contact centre which will be market tested in late 2015 as agreed in Paper No. 14- 517
30. In addition to the work being carried out to support the corporate contact centre approach, a number of other telephony projects is underway or is planned including automated rent refund and rent payment card request lines.
31. Additionally the current version of the voice system (VoiceConnect) that is in use across the Council, which will shortly no longer be supported, has recently become unreliable and ideally should be replaced. Whilst it is possible to upgrade to a newer version of VoiceConnect, this telephony solution does not offer the facility for self-service or back office integration.
32. The Netcall telephony system, which has been in use by the Council since 2011, was first used to automate the setting up of direct debits for Council Tax and later adopted for use on the Council Tax & Benefits call centre, being more recently expanded to provide a rent balance checker and rent statement and also to provide the automated switchboard service. This system provides customer engagement solutions that support the Council's drive to automate services, expand self-service options and integrate with back office functions. This reduces the volume of calls that require contact centre officer intervention as well as reducing back office transactional work through integration.
33. Therefore it is proposed to continue to use Netcall for future pieces of work as the time and cost of replacing this system would be prohibitive to fulfilling the

Channel Shift Strategy. Approval is sought for spend with Netcall up to the value of £150,000 as the value of future work with this supplier cannot be determined at this point in time. This is permitted under regulation 14(1)(a)(iii) of the Public Contracts Regulations 2006 as “for technical reasons..... the public contract may be awarded only to a particular operator”.

34. It is further proposed therefore that the Netcall system is used to replace the VoiceConnect telephony system as this becomes necessary. This will enable the services that may not join the corporate contact centre to also offer 24/7 telephone self-service. It will also provide the Council with improved business intelligence across a range of services, a resilient platform that has the capacity to support the Council's online first and self-service aims and a corporate telephony identity. It is also proposed to continue to use the Netcall telephony platform to progress the corporate contact centre implementation, utilising it for the initial call screening and self-service facilities. Outside of office hours this will also enable residents to leave information that will integrate into back office systems, download or request forms, etc., as well as accessing a range of information that promotes the Council's online services and website information with these facilities being available 24/7. This will be complemented by the SSO system that provides 24/7 online access to a number of high profile Council services.
35. In order to effectively manage and facilitate the increasing use of the Netcall services a coordinated approach is required. Therefore a Netcall steering group has been formed involving key business stakeholders and IT/Telecoms representatives and managed by the Head of Benefits and Customer Services. This group will decide on the best way forward for the management of the Netcall contract and the associated application support and development.

HOTLINES

36. In view of the wide range of services that the Contact Centre will handle Paper No. 14-13 agreed to establish a number of published “hotlines” for ease of use by the public and a provisional grouping of services was presented in this report. Initially these hotlines would be introduced as services move into the contact centre.
37. As some services are now operational within the Contact Centre, or programmed to join before March 2015, it is timely to seek to agree the grouping of the first six lines. It is proposed that no new telephone numbers are created but that existing high volume telephone lines are maintained and where more than one line exists within a grouping the line with highest volume of calls received becomes the “hotline” number.

38. The “hotline” number would be the only published number for the service. This would enable straightforward enquiries to be handled through the Netcall self-service facility within the Contact Centre with a transfer to the back office only being necessary for the complex calls. The Contact Centre will be aiming to resolve 80% of calls received. For on-going matters, callers are likely to be given back office numbers to contact directly the officer dealing with their enquiry. A draft list of proposed hotline groupings and suggested telephone numbers is presented in Appendix 7.
39. Whilst calls to the recently introduced automated switchboard will remain unchanged, all calls to a directly dialled to a hotline number will initially be answered by the Netcall self service facility. This will offer the caller the opportunity to either:
- Receive automated messages regarding FAQs and web addresses;
 - Leave information for integration into the relevant back office system; or
 - Speak to a member of Contact Centre staff.
40. It is proposed that as other services move to the Contact Centre further hotlines will be established in line with the provisional grouping or alternatively, where suitable, services could be considered for an addition to an existing hotline. For service areas where a corporate contact centre approach is not currently being considered it is proposed that hotlines with menu driven choices should be introduced.
41. Presently all web pages contain the Council’s main telephone number 0208-871-6000. In addition, at least one telephone number is given for each service area. Residents that are visiting the website have selected the web channel by choice. Therefore it seems sensible not to redirect them back to the telephone channel. As a result in order to maximise channel shift and to encourage residents to remain on the website to resolve their enquiry where possible, it is proposed that all telephone numbers except “hotlines” are removed from the site. This will ensure that if the resident still chooses to move to the telephone channel as their means of contact they will be directed to the corporate call centre and not the back office.
42. The removal of non hotline telephone numbers from the website will be assisted by the proposed implementation of the “Contact Us” web page. The current “Contact Us” page is currently the fifth most visited page on the Council’s website and, whilst the number of visitors to this page has reduced compared to the previous year, this page was still had over 63,000 visits. The information on this page drives residents to phone or visit the Council. However, a fundamental change to this has previously been agreed (Paper No. 14-43) with the aim being to deliver a complete online service.

43. Work is underway by the Web Team to re-design this page to make it more intelligent, taking customers through a series of questions and, where possible, pushing them to complete the transaction online via an e-form. The aim will be for these forms to feed directly to back office systems.
44. To drive channel shift and to ensure best use of these forms it is proposed that contact information including telephone numbers and email addresses are excluded from these forms and also removed from the website and that the only contact details published are the hotlines. However to complement this it is proposed that the Council's main telephone number remains easily available on the Council's website.

OTHER SOCIAL MEDIA IN THE CONTACT CENTRE

45. Paper No. 14-516 (Administration Department reviews) gave agreement to developing a new customer services Twitter channel, which will be separate from the corporate communications team (CCT), and which will be dealt with by the Contact Centre. It is thought likely that interaction with customers via Twitter in a contact centre setting would be more cost-effective than phone call handling. This will be implemented in 2015/16 with the process being developed collaboratively between the CCT and the Head of Benefits and Customer Services.
46. The use of Web Chat could be considered for appropriate services. Web chat is a system that allows users to communicate in real time using easily accessible web interfaces. This would give Contact Centre operators the ability to intercept residents using the website by offering them an immediate interactive service to resolve their enquiry. This is likely to enable Contact Centre operators to handle up to three enquiries at one time. Therefore it is proposed that use of Web chat in the Contact Centre is considered once the work to move Administration and Finance Department calls into the Contact Centre has been completed.
47. The use of YouTube information videos has been suggested, initially to support customers registering on the Council's SSO page. If successful this could be considered for use in other high-volume/transactional services where an information video clip could assist customers with their enquiry and would reduce face-to-face or telephone callers. Therefore it is proposed that this be evaluated for implementation.

PERFORMANCE MEASURES

48. Paper No. 13-76 introduced the development of channel shift performance indicators into the Council's topline indicator set from 2013/14 to monitor the delivery of the Council's Online First initiative. These are now regularly reported to the OSCs.

49. In addition, in order to measure the Council's progress in achieving channel shift, some further performance indicators have been proposed. These will measure both the quantitative impact in terms of move from traditional service delivery as well as, where possible, qualitative impact to the customer. These are shown in Appendix 8.

EQUALITY IMPACT ASSESSMENT

50. The Equality Act 2010 requires that the Council, when exercising its functions must have due regard to the need to eliminate discrimination, to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it and to foster good relations between persons who share a relevant characteristic and persons who do not share it. As such an Equality Impact Assessment (EIA) has been undertaken on the proposals contained in this report.
51. Accordingly an EIA has been carried out on the impact to residents from the proposals in this report. This assessment has found that the implementation of further online first initiatives including telephony self-service will result in an improved service that is available to residents 24 hours a day allowing residents to download or request forms and access information. The move to a corporate call centre approach, supported by the introduction of a set of "Hotline" numbers, should make it easier for residents to get through to the service they need and the introduction of the online forms provides an additional contact channel which will reduce the need for back office clarification and speed up processes. The expansion of the self-service facilities in the Customer Services Centre, which will be supported by floorwalkers, will assist residents to access online options quickly and will provide support to customers not familiar with accessing services in this way. Appendix 9 provides further details.

FINANCIAL IMPLICATIONS

52. A budget of £460,000 funded from the renewals fund is available in 2014/15 for the Channel Shift programme. The proposals outlined in this report will be funded from within this sum. The digitisation process is one of the key components that will enable the Council to rationalise office accommodation and generate capital receipts for the General Fund. Over time, the processes outlined in this report may generate further savings for the Council which will be recognised in future reports to committee.

CONCLUSION

53. Significant progress continues to be made in the delivery of the Channel Shift Strategy and associated initiatives, all of which have the potential to provide

significant savings to the Council whilst improving and widening customer access to services. However, work is still required to maintain this momentum and it is hoped that the implementation of the SSO facility, which will be underpinned by a set of solely online standards within the Finance Department, will result in other departments adopting a similar approach.

54. Additionally, there are clear benefits offered by moving to a self service telephony system that provides 24/7 access to service information and the facility to leave data at any time, together with the facility to integrate this data into back office systems. When supported by the SSO facility, Contact Us Webforms and the initiative to move residual telephone calls to corporate contact centre, there is clear potential to provide further savings and improve the customers experience of contacting the Council, therefore it is hoped that other departments will consider adopting a similar approach.

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18th November 2014

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Background papers

There are no background papers to this report.

All reports to Overview and Scrutiny Committees, regulatory and other committees, the Executive and the full Council can be viewed on the Council's website (www.wandsworth.gov.uk/moderngov) unless the report was published before May 2001, in which case the Committee Secretary (Graham Collins – 020 8871 6021; email gcollins@wandsworth.gov.uk) can supply it if required.