
REPORT TO:	FINANCE & MANAGEMENT	AGENDA ITEM:13
DATE OF MEETING:	22ND JUNE 2006	CATEGORY: OPEN
REPORT FROM:	DIRECTOR OF CORPORATE SERVICES	
MEMBERS' CONTACT POINT:	PAM CARROLL (EXT 5784)	DOC:
SUBJECT:	CUSTOMER SERVICE CODE OF PRACTICE AND STANDARDS & MYSTERY SHOPPER REPORT	REF: JJ
WARD(S) AFFECTED:	ALL	TERMS OF REFERENCE:

1.0 Recommendations

1.1 That the Committee:

- Notes the results of the mystery shopper survey
- Agrees the draft Customer Service Code of Practice and Standards and action plans

2.0 Purpose of Report

- 2.1 Present the findings and results of the first wave of the mystery shopper survey and action plans for improvements.
- 2.2 To inform committee of the content of the Customer Service Code of Practice and Standards and to outline steps to develop these standards

3.0 Executive Summary

- 3.1 Funding was secured to carry out three waves of mystery shopping. The first wave was undertaken in Jan/Feb 2006.
- 3.2 The overall objective was to benchmark the customer service of each member of the Derbyshire Partnership to enable us to address the issues that arose and to implement necessary improvements.
- 3.3 The survey tested how easy it is for customer to access services using e-mail and telephone during normal office hours and out of normal office hours and to identify areas where the customer experience could be improved and to recommend improvements.
- 3.4 The results of the survey found several key areas for improvements across all access channels. Our overall performance was in the bottom quarter across the benchmark group in the Derbyshire partnership. However, when compared to the all authority

benchmark group, we were in the upper quartile in 2006 against the bottom quartile in 2005.

- 3.5 One of our priorities in the 2006-2009 Corporate Plan is “*more efficient, customer focused services*” and establishing service standards is a key action for achieving this.
- 3.6 There is already a lot of good customer service practice within the Authority, there is however, a need to formalise this good practice ensuring that the principles are embraced and adopted by all employees. This will allow us to respond to and communicate with our customers in a consistent manner no matter whom they contact and the method they choose to do so.
- 3.7 The Code of Practice sets out the way in which we should deal with our customers whether by letter, telephone, face to face, e-mail or another form of communication
- 3.8 In addition, we will be able to measure our service and therefore identify, manage and improve any areas where we are not meeting the standards.
- 3.9 Having made such a significant investment in the Customer First project we now need to make sure that our customers receive the benefit from this investment by ensuring a consistent level of customer service is given in both the front and back office.
- 3.10 In return we have the prospect of increasing the public’s perception of the council and raising our profile in the local community.

4. Detail

Mystery Shopper Survey

- 4.1 The Derbyshire Partnership Customer Service Managers group secured funding from the Regional Centre of Excellence and the Derbyshire E-Government partnership to carry out three waves of mystery shopping. The first wave was undertaken in Jan/February 2006 with wave 2 in July 2006 and wave 3 in Dec 06/Jan 07.
- 4.2 The overall objective was to benchmark and review the customer service of each partner across a wide range of services and multiple access channels. The benchmarking data obtained from the Mystery Shopping exercise will enable us to address the issues that arose and to implement necessary improvements.
- 4.3 Specific objectives were:
 - To research and provide baseline data for the development and improvement of services across the Derbyshire Partnership member organisations using Mystery Shopping
 - To test how easy or difficult it is for customers to access services
 - To test the access channels of email and telephone during normal office hours and out of normal office hours
 - To test email and telephone access
 - To test the accessibility of contact details available from the website
 - To test performance where a customer contacts the wrong partner authority and has to be referred to a different partner organisation.
 - To identify examples of good practice that can be used positively within the partner organisations.

- To identify areas where the customer experience could be improved and to recommend improvements.
- To benchmark the results against other similar local authorities.
- To measure the results against the Local Government Customer Service Benchmark report (LGCSB)

4.4 **Telephone Calls** The key findings in the report were:

- contactability (the likelihood of getting through to a person first time) was reasonably good (84%)
- the time to answer was good (9.6 secs for switchboards, 6.2 secs for other numbers)
- there was an overall high standard of service provided
- staff were almost invariably courteous, polite and helpful
- staff listened, owned the problem and usually tried to establish rapport
- calls were seldom transferred more than once
- significant variation between the way different departments handled calls
- switchboard and initial response were weaker than the rest of the call
- when calls are made to the wrong partner callers are generally given the correct number to call and no-one declined to answer

However:

- there are indications that calls are not reliably returned in response to messages left
- the indications are that call transfer techniques generally could be improved

The individual call issues which are considered important to the customer and where there would seem to be potential for improvement are:

- salutation
- fully answered query
- told where being transferred to
- offered further help
- person briefed (transfer call)
- gave authority or organisation name

Overall Performance –Telephone Calls

- Benchmark position in Derbyshire: 9th out of 11

4.5 **E-mails:** The key findings were:

- the response rate was 86%
- the average speed of final reply was 1.5days
- there were very high scores for courtesy, clarity and professional language
- overall efficiency was rated lower than the partnership average
- of the email responses received only 83% fully answered the query (10% lower than partnership average)

However:

- the overall score was 5% weaker than the equivalent LGCSB score in 2005
- the auto-response rate was 14% (LGCSB 6%)

The individual email issues which are important to the customer and where there would seem to be potential for improvement are:

- final response rate
- auto acknowledgement
- used name
- name of sender
- telephone number of sender
- job title of sender
- department of sender
- layout professional

Overall Performance - Emails

Benchmark position in Derbyshire: 6th out of 11

4.6 **Websites:** The key findings were:

- the site has an A to Z facility
- the site has an easy-to-find job vacancies
- leisure centre details are easy to find
- there is a search facility on the home page

However:

- not all telephone numbers given are appropriate
- some A to Z searches do not work in an optimal way
- many search facilities are unstructured, giving all references to the word used
- not all common words are used in A to Zs and other searchable documents (e.g. tip)
- accessibility does not have an enhanced contract option

Overall Performance - Website

Benchmark position in Derbyshire: 5th out of 11

4.7 **Customer Service Standards:** The key findings were:

- no standards available internally
- no standards published on the website

4.8 **Recommendations**

4.8.1 **General:** Clearly there are many causes for congratulations where the findings show a high level of performance by staff. Inevitably programmes such as this can tend to focus on weaknesses, because that is a key element of the continuous improvement process, but it is important to ensure a balanced picture is given.

4.8.2 **Standards:** A set of customer standards needs to be developed.

4.8.3 **Calls:** Recommendations are that:

- focus be given to the issue of ensuring calls are reliably (and promptly) returned in response to messages left.

- focus be given to call transfer techniques
- staff be reminded of the
 - desirability of using a salutation
 - the importance of checking at the end of a call whether the query has been fully answered
 - the positive impression conveyed by the offer of further help
 - the reasons why it is important to give the Council name when answering an external call

4.8.4 Emails: Recommendations are that:

- the reasons for the missing email responses be investigated
- ways of providing an auto-response system be investigated
- staff be reminded of the
 - desirability of using the enquirer's name
 - the importance of giving the name, telephone number and (ideally) job title of the sender
 - the importance of a professional layout

4.8.5 Websites: Recommendations are that:

- the list of telephone numbers obtained from the websites but not used be investigated
- a review of the way A to Z searches work search for information
- a review of accessibility, ideally with all sites conforming to an accepted accessibility standard with enhanced contrast option

4.9 **Action Plans** have been developed to address the issues raised in the report. A copy is attached as Appendix A.

Customer Service Code of Practice and Standards

4.10 One of our priorities in the 2006-2009 Corporate Plan is "*more efficient, customer focused services*" and establishing service standards is a key action for achieving this.

4.11 Setting standards makes it possible for us to measure by how much we have improved. These standards will help us to make the improvements identified in the mystery shopper report and build on the investment already made in the Customer First project and the reception refurbishment.

4.12 There is already a lot of good customer service practice within the Authority, there is however, a need to formalise this good practice ensuring that the principles are embraced and adopted by all employees. This will allow us to respond to and communicate with our customers in a consistent manner no matter whom they contact and the method they choose to do so.

4.13 The Code of Practice sets out the way in which we should deal with our customers whether by letter, telephone, face to face, e-mail or another form of communication.

4.14 The document sets out the standards, performance measures and monitoring information for the Authority.

The document sets standards for:

- The telephone
- Written communication (letters, e-mails, faxes)
- Face to face
- Customer feedback

A copy of the summary document is attached as Appendix B. A full copy of the Customer Service Code of Practice and Standards is available on the intranet at Corporate Services/IT & Customer Services/Customer Services

Action Plan

- 4.15 It is proposed that Customer Service Champions are appointed from each service area. This will form a Customer Service group who will assist in the implementation and monitoring of the standards.
- 4.16 The Customer Services Manager will meet with each Head of Service to identify the “champions” and to develop an individual action plan to address the issues raised in the mystery shopper report and implement the Code of Practice and Standards.
- 4.17 The second wave of the mystery shopper to be carried out in July will identify any further areas for improvements and any improvements already made as a consequence of the first report. The third wave of the mystery shopper to be carried out in January 2007 will again monitor that the standards are being implemented.
- 4.18 Quarterly reports will be made to the Finance and Management Committee, commencing in October 2006.
- 4.19 **A full copy of the action plan is attached as Appendix C.**

5.0 Financial Implications

- 5.1 None.

6.0 Corporate Implications

- 6.1 The Customer Service Code of Practice and Standards plays a major part in meeting one of our Corporate Plan priorities. It is anticipated that customer service will become a key element of any forthcoming CPA assessments.
- 6.2 The standards will help the council to review the way it delivers services to its customers and clarify the service standards that customers can expect, another key element of the CPA.
- 6.3 The Project will also enable the council to measure our standards against other councils to ensure that the practices we follow are customer focused.

7.0 Community Implications

- 7.1 Our external and internal customers will benefit from having a clear set of customer service standards and clear expectations from the council.
- 7.2 We will be able to measure our service and therefore identify, manage and improve any areas where we are not meeting the standards.

8.0 Conclusions

- 8.1 Having made such a significant investment in the Customer First project we now need to make sure that our customers receive the benefit from this investment by ensuring a consistent level of customer service is given in both the front and back office.
- 8.2 In return we have the prospect of increasing the public's perception of the council and raising our profile in the local community.

Mystery Shopper Report – Actions Plans

Telephone - Quick Wins

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Standards	Customer Service Standard and Code of Practice to be issued	Customer Services Manager	July 2006	Clear standards in place.	Regular review and monitoring against standards
2.	Desirability of using a salutation	Change standard greeting	Customer Services Staff	In place	Salutation used on switchboard	Measure in next wave of mystery shopper
3.	Importance of giving the Council Name	Change standard greeting	Customer Services Staff	In place	Council name given when call answered	Measure in next wave of mystery shopper

Telephone - Longer Term Actions

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Importance of giving the Council Name	Through new service standards, change standard greeting	Departmental	July 2006	Council name given on all external calls received	Measure in next wave of mystery shopper
2.	Desirability of using a salutation	Through new service standards, change standard greeting	Departmental	July 2006	Salutation used on all external calls received	Measure in next wave of mystery shopper
3.	Call transfer techniques	Develop awareness of taking ownership of calls	Departmental.	July 2006	Calls transferred effectively	Tailored training targeted through PDR
4.	Out of hours calls	Explore telephone software to provide ooh message	IT	June 2006	Out of hours callers are given details of who to contact in an emergency and opening hours.	Streamline to use voice mail facility

Email - Quick Wins

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Name telephone number and job title of sender	Customer service standard on the structure of e-mails	Customer Services Manager	July 2006	E-mails will be professional and will contain the recommended detail	Test again with next wave of mystery shopper
2.	Professional layout	Customer service standard on the structure of e-mails	Customer Services Manager	July 2006	E-mails will be professional and will contain the recommended detail	Test again with next wave of mystery shopper
3.	Desirability of using the enquirer's name	Customer service standard on the structure of e-mails	Customer Services Manager	July 2006	E-mails will be professional and will contain the recommended detail	Test again with next wave of mystery shopper

Email - Longer Term Actions

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Missing e-mails	Customer service standard on answering e-mails.	Customer Services Manager	July 2006	E-mails answered	Extend the automated response

Web Site - Quick Wins

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Customer Service Standards not published	Publish current service standards	Customer Services Manager/ Web Editor	July 2006	CS standards on the website	Monitor and update
2.	Phone numbers obtained from the website not used	Identify and investigate. Correct if necessary	Web Editor	June 2006	Correct numbers on website	Monitor and update
3.	Offering Website as an alternative – C18	Staff Training	ALL	June 2006	Website offered as an alternative	Next wave of mystery shopper

Web Site - Longer Term Actions

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
1.	Website Name and Format	Register and implement new website address	Customer Services Manager/ Web Editor	Done	Easier access to website	Promote new website address
2.	Website Accessibility	'Badge' our site with WAI level. Investigate 'large text' option	Web Editor	Dec 2006	Better accessibility	

	Issue Identified by Mystery Shopper Exercise	Details of the action(s) to be taken to address the Issue	Who will take the action	Date of action	Result of the Action	Future Action Required
3.	A-Z search - type in Council Tax in Search 118 pages came up & Council Tax enquiries was not at the top of the list.	A-Z to be upgraded shortly, has improved search. Test new version for improvement. Discuss with suppliers if necessary	Web Editor	Dec 2006	Improved A-Z	Work with suppliers to develop software
4.	Searching on common words eg "tip", "dustbin" – not producing results	Review of meta data – identify and incorporate common words	Web Editor	Dec 2006	Common words incorporated	Ongoing additions to meta data.

CUSTOMER FIRST – CUSTOMER SUMMARY

One of our Corporate Plan priorities is

“More efficient customer focused services”

All of us at South Derbyshire District Council will:

- Be welcoming and courteous
- Be fair and respectful
- Be helpful and responsive
- Provide good quality information suited to your needs
- Communicate clearly
- Let you know what we can provide, who to contact and how
- Let you know how to make suggestions for improvements
- Keep you informed

If you telephone us we will:

- Try to answer within 10 seconds or four rings
- Tell you who you are speaking to
- Try to deal with your enquiry within one working day
- Respond to any voicemail message you leave us within one day

If you write, fax or email us we will:

- Acknowledge your e-mail within 24 hours
- Try to reply to you within 10 working days by telephone, fax letter or email
- Be clear and use plain language
- Use Braille, large print and different languages if you need us to

If you visit us we will:

- Welcome you on arrival
- Deal with you promptly keeping any delays down to 20 minutes
- Keep our reception areas clean, warm and comfortable

If we visit you we will:

- Be prompt and try to keep any delays down to 10 minutes
- Show you our South Derbyshire District Council identity card

CUSTOMER FIRST – CUSTOMER SUMMARY

We will ask for your views on the services you use. We will:

- Use your comments to help us improve

If you are unhappy with the service you receive, we want to know. You can

- Fill in a leaflet available from reception area or call us on 01283 595795

If you make a complaint we will:

- Acknowledge your complaint within five working days
- Investigate your complaint
- Provide a written response within 20 working days.

CUSTOMER SERVICE CODE OF PRACTICE AND STANDARDS

ACTION PLAN

	Details of the action(s) to be taken	Who will take the action	Date of action	Result of the Action	Future Action Required
4.	Draft document to Heads of Service for consultation	Customer Services Manager (CSM)	June 2006	Buy in from all service areas	Update document to reflect feedback
5.	Draft document to F&M	CSM	22 June 2006	Members fully informed of standards	Update document to reflect feedback
6.	Draft document on intranet	CSM	June 2006	Draft document available for everyone to view and comment on	Feedback
7.	Article in team brief to promote standards	CSM	June 2006	Raise awareness	Promote through "The News"
8.	Meet with all Heads of Service to develop tailored action plans to deal with the issues from the mystery shopper report and how to implement the new standards. Nominate customer service champions	CSM/Heads of service	June-July 2006	Actions plans in all service areas	Ongoing quarterly monitoring of standards and update of action plans
9.	Produce final document	CSM	July 2006	Document widely available and promoted	Ongoing. Update and promote
10.	Condense standards into single page customer summary leaflet	CSM	July 2006	Leaflet available in the public domain	Ongoing. Update and promote

	Details of the action(s) to be taken	Who will take the action	Date of action	Result of the Action	Future Action Required
11.	Make document available on website	CSM/Web Editor	July 2006	“	“
12.	Investigate customer service training options Train the trainer? Customer Service Champions? Nominated staff? All?	CSM/HR	June – July 2006	Training programme in place	Train all new customer service staff. Induction?
13.	First meeting of Customer Service Champions Group	CSM/Champions	August 2006	Group established. Standards reviewed and reinforced. Action plans monitored.	Quarterly meetings.
14.	Review results of second wave of mystery shopper	CSM/Champions	Sept 2006	Improvements/ areas for improvements identified	Amend action plans
15.	Monitor standards and produce quarterly monitoring report for F&M	CSM/Champions	Oct 2006	Progress reported	Ongoing