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| REPORT TO: | FINANCE AND MANAGEMENT COMMITTEE | AGENDA ITEM: 8 |
| DATE OF MEETING: | 26TH APRIL 2012 | CATEGORY: DELEGATED |
| REPORT FROM: | DIRECTOR OF OPERATIONS | OPEN |
| MEMBERS' CONTACT POINT: | MARTIN GUEST (228705) Martin.guest@south-derbys.gov.uk | DOC: |
| SUBJECT: | CUSTOMER ACCESS STRATEGY 2012 TO 2015 | REF: |
| WARD(S) AFFECTED: | ALL | TERMS OF REFERENCE: FM03 |

## 1.0 Recommendations

1.1 That Members approve the proposed new Customer Access Strategy, shown in Appendix A.

1.2 That Members approve the establishment of a Project Board and Delivery Group shown in Appendix C led by the Director of Operations to oversee the implementation of the Customer Access Strategy.

1.3 That Members nominate a Member Champion to be part of the Project Board.

1.4 That Members approve the high level improvement plan for the first year, 2012/13, contained in Appendix D to be managed through the Project Board and Delivery Group.

## 2.0 Purpose of Report

2.1 To present a Customer Access Strategy that will set down the Council's approach for providing a flexible service capable of meeting the needs of customer for the next 5 to 10 years. This strategy builds on the work first initiated by the Customer First Project, the enhancements through the Councils Partnership with Northgate Public Services, technological advances and the changing requirements of customers.

2.2 The strategy will enable us to anticipate the customer changes that lie ahead and ensure that the Council is capable of meeting demands in the most efficient and cost effective manner.

## 3.0 Executive Summary

3.1 The report looks at how the current arrangements for customer contact began in 2004 and have been developed through the Customer First Programme.

3.2     Since the commencement of the partnership with Northgate Public Services in August 2010 these arrangements have been developed and improved, with further investment and changes to process.  This has resulted in high performance and satisfaction levels.  An outcome of this work was the achievement of the Best Customer Service Performance in the Burton Mail Business Awards 2011.

3.3     The report provides an overview of the research undertaken into the past and current levels of customer contact, best practice research papers and the main methods by which customers contact the Council.

3.4     The report also provides the rationale behind the development of a new Customer Access Strategy to transform customer services across the Council over the next 3 years.

## 4.0     Detail

### Customer First

4.1     The current customer contact centre opened in March 2004 and was staffed by existing members of customer services.

4.2     These arrangements were developed further when this Committee formally adopted the Customer First programme on 16 June 2005.  This programme was to transform the provision of customer services at the Council. Progress continued on this programme until 2006.

4.3     Phase 2 of Customer First was scheduled to commence in April 2007 when the Council was to review the progress made and re-visit all service areas to capture services that were not reviewed in the first phase.   However this phase did not commence as planned.

### Progress since August 2010

4.4     The Council is renowned for its good standards of customer service. Its friendly and knowledgeable staff always put the needs of residents first. This reputation has reached new heights since Northgate Public Services began managing its Customer Services Team through the partnership in August 2010.

4.5     Northgate has from this date driven up efficiency, first time resolutions and quality by investing time in staff training and process innovation. The customer services team is now dealing with 20% more contact on a daily basis and is improving performance across the board.

4.6     Changing working patterns to provide more staff on telephones at peak times has seen 97% of calls answered compared to a pre contract average of 89%, with 81% responded to within 20 seconds (up from 74%).

4.7     A total of 92% of queries are resolved at the first point of contact, while abandoned calls have dropped steeply from 10% to 3.3%.

4.8 Visitors to the Council are acknowledged on their arrival and are seen by an expert advisor within three minutes. New quality guidelines ensure that customers receive a consistent response, while the prestigious Varney Standard is adhered to at all times.

4.9 Other measures have included campaigns to convert customers to the quick and convenient Direct Debit payment service, with more than 1,000 signing up in six months, and a new fast track till to provide a quicker service.

4.10 It is clear the most important person, the customer, values the service. Satisfaction surveys are consistently high, at between 93% and 96%. Continuous improvement is at the heart of the customer ethos in South Derbyshire. Every task is monitored and analysed to consider in depth the way an already high performing service can be enhanced further. Every day there are examples of customers leaving the Council Offices feeling valued, respected and reassured.

4.11 As part of Northgate commitment to the development of the regional business centre, additional work has already begun to come in through the South Derbyshire contact centre with increased volumes being generated from other clients. This work has been successfully brought in through the contact centre and has met all customer service targets set as part of the contract. This work will continue to be generated as new clients are brought into the regional business centre.

4.12 The improvements so far in customer services have centred mainly on the customer contact centre. Part of the new strategy will look at all customer contact from across the Council and how through investment and consistent process this can drive further improvement in the delivery of services for the community.

**Reviewing customer access arrangements across the Council**

4.13 As part of the service reviews being undertaken across the Council, Northgate have also identified improvements relating to the delivery of customer services. Customer service delivery is currently fragmented, with a large number of entry points for customers to access services through staff who provide a mix of front and back office functions.

4.14 These reviews have emphasised the need for this work to be fast tracked and included as part of a wider holistic review of Customer Access across the Council, building on the work of the Customer First programme.

4.15 In order to progress this further, research has been completed to gather information about the holistic picture of customer contact across the Council. This is detailed in Appendix B. In addition, information has also been sought from research papers published into the subject.

**What is the research telling us?**

4.16 In summary the research has told us that:

- Where service requests are personal or sensitive and need personal contact the Council needs to provide one universal face to face contact point for customers, incorporating all service areas.[1]
- Customers want to access services when and how they choose to do so and the Council needs to develop a range of access channels to embrace this.[2]
- Most residents need to access up to date accurate information on which they can base their decisions on whether they choose to engage with the Council.[3]
- Web and self service are the most cost effective access points for the Council and there is potential to develop these quickly across a range of services.[4]
- Access to some services is limited in terms of the access channels available, in some services this is predominantly available through face to face or by phone access – for example in Environment Services and Housing.[5]
- Where services have developed different methods to access services through the website it has been effective and has resulted in significantly higher usage – for example Planning and Building Control.[6]
- New ways of contacting the Council such as SMS text messages are being used in Housing and this has achieved good response rates from customers; this method should be considered to be rolled out to other service areas.

4.17 Further analysis of this research is shown in Appendix B.

**What do our customers want?**

4.18 According to Government research, customers want contact which gives them:

- Right first time information
- One point of contact
- Prompt reliable decisions
- Accessibility to services
- A record of previous interaction
- The feeling that they are being listened to
- An understanding of their needs and treated with respect
- A proactive response to enquiries

These expectations are the basis of all good customer service and make the customer experience pleasant and hassle free.

4.19 The Localism Act 2010 is shifting power from central government back into the hands of individuals, communities and councils. The Government trusts people to take charge of their lives and they are pushing power downwards and outwards to the lowest possible level, including individuals, neighbourhoods, professionals and communities as well as local councils and other local institutions. At the heart of the

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[1] Call and Contact Centres in Local Government – Getting it Right! Alison Wheeler, Rory Heap (www.idea.gov.uk) p12
[2] Customer Led Transformation Programme Summaries and CAP Projects. Siobhan Coughlan (www.idea.gov.uk) p2
[3] Insight: Understanding your Citizens, Customers and Communities. Ingrid Koehler (www.idea.gov.uk) p10
[4] Research Analysis Report section 5.2
[5] Research Analysis Report section 4.1.3
[6] Research Analysis Report section 4.1

Localism Act is therefore a strong emphasis on meeting the needs of local people by delivering services at the first point of contact.

**Customer Access Strategy**

4.20 The Council is committed to improving access to services for all customers. A Customer Access Strategy therefore should define the Council's objectives for customer contact, having regard to affordability, and set out a roadmap for achieving those objectives. The proposed strategy for Member approval is attached at Appendix A.

4.21 At its heart is a consistent approach which will make customer interactions with the Council:
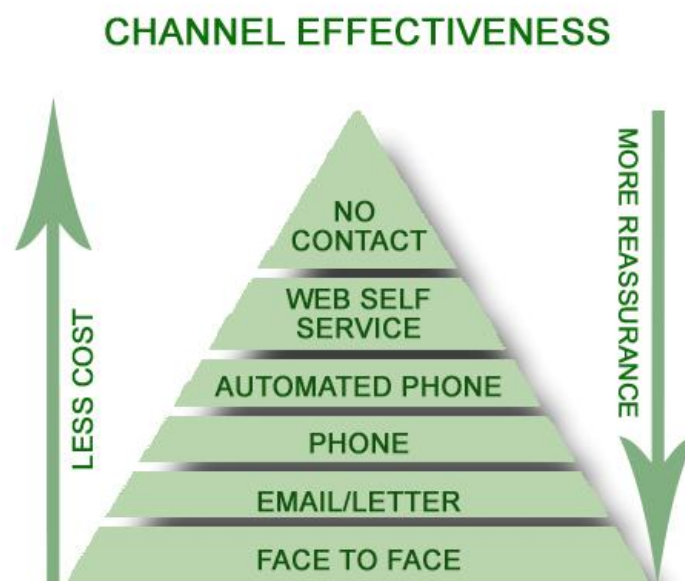
- Cost-effective
- Customer focused and friendly
- Integrated and co-ordinated
- Responsive, appropriate and flexible
- Timely and effective
- Consistent

**Customer Service Strategic Objectives**

4.22 The strategic objectives to be achieved through the Customer Access Strategy are:

1. Bringing together all of the first point of customer contact into a single central contact point.
2. Delivering a consistently high level of customer service, aimed at satisfying a request at the first point of contact.
3. Delivering the most cost effective access channel which meets the customer's needs.

4.23 The diagram below highlights the expected and desired shift that will need to take place to deliver against these strategic objectives.

## CHANNEL EFFECTIVENESS

LESS COST

MORE REASSURANCE

NO CONTACT

WEB SELF SERVICE

AUTOMATED PHONE

PHONE

EMAIL/LETTER

FACE TO FACE

4.24    Customer contact and access will be shifted towards the top of this triangle as this is the most cost effective route and this will be supported by technology enablers such as the development of the web, Customer Relationship Management (CRM) technology and other methods of self service.

4.25    An effective approach to this channel shift will reduce demand on high cost entry points by providing relevant information and enabling lower cost self service for applicable services and information.

4.26    This will enable the Council to shift full transactions onto self service platforms, for example, automated and standardised payment and to move from resource intensive face to face service delivery to telephone or from telephone to self service via transactional web services. The development of other contact channels like text messaging and e-forms will support this objective.

4.27    Where a specific contact cannot be delivered through an access point or requires more individual support, it will be offered through the channels at the base of this triangle through the single central contact point.

4.28    The Strategy recommends using the most cost effective method to engage customers, the type of engagement that is best supported by each channel and the way channels interact with each other.

4.29    Consistency of information and service provision are important and will give the Council the ability to analyse channel usage and provide a better understanding of customer behaviour and preferences.

4.30    The deeper in the organisation that the customer request is resolved then the higher the cost is for the Council. If the request can be resolved at the first point of contact the costs are much less than being passed through different levels of the organisation. This sits alongside a happier customer who has had their query resolved at the first point of contact without the need to be kept waiting or passed through the Council. Not all requests can be resolved here and with investment in systems such as CRM, document management and an appointment system, work if necessary can be transferred to service areas in the most effective and timely manner.

4.31    The service reviews that have been completed have also changed processes on the front line to take advantage of these improvements.

4.32    Over the next three years the plan is to drive the shift to the first point of resolution by:

- Consolidating customer facing functions together.
- Making efficiency improvements to improve customer processes.
- Investing in channel development.

# High Level Delivery Plan



**YEAR 1**   **YEAR 2**   **YEAR 3**

Consolidate all customer activity

Efficiencies realised

Investment
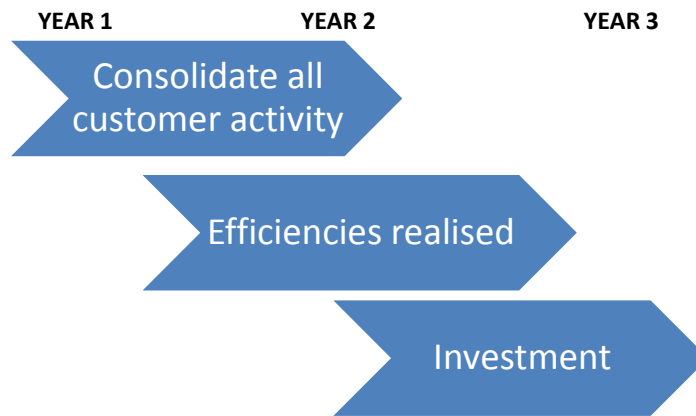
4.33   It is proposed that a Project Board is set up to deliver the strategy. This Board will be led by the Director of Operations and a Member Champion. The membership of this group should include representatives from the Council and Northgate Public Services, the details of this are shown in Appendix C.

4.34   The Customer Access Strategy is a key project which is helping to transform the way customers are able to access and engage with Council services. The diagram below demonstrates how customers will access services and how services will interact to ensure customer focus and efficient, effective delivery. A continuous process of evaluating priorities and reconsidering service design and delivery ensures a dynamic model of delivery that is able to react to and meet future challenges.
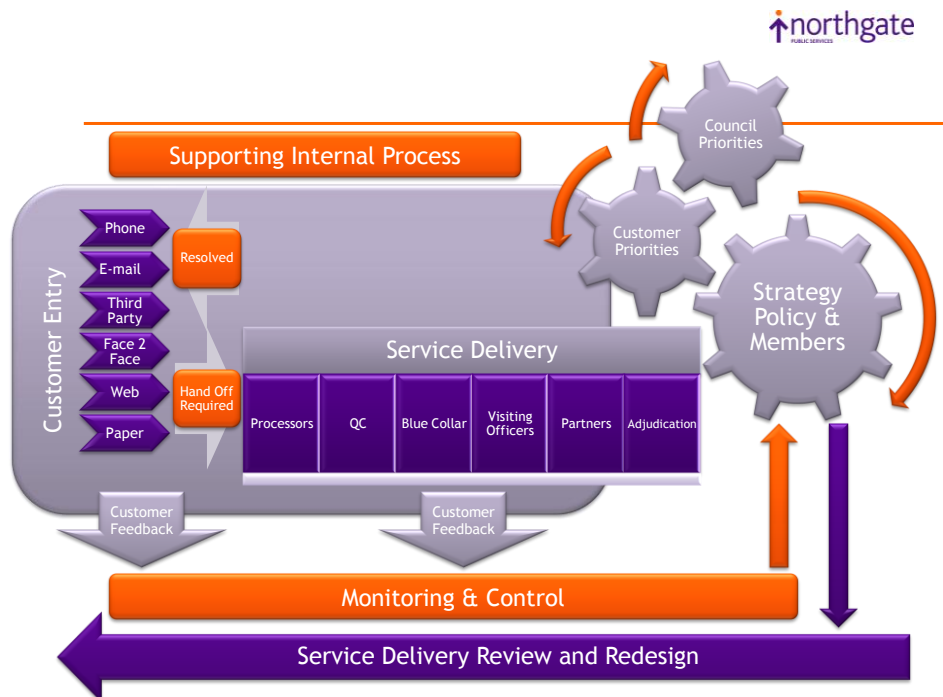


## 5.0   Financial Implications

5.1   The new strategy would be cost effective in reducing costs while providing a wider range of access channels for customers.

**6.0 Corporate Implications**

6.1 The Council's Corporate Plan sets out how the Council is working to improve services across the District and delivering the key strategic direction, priorities and targets for the Council over the next five years. The development of a Customer Access Strategy is a key part of the 'Value for Money' theme under the outcome to provide an improved customer experience.

6.2 Within the Corporate Plan the Council is also committed to 'Cutting costs not services' in terms of driving efficiencies.

**7.0 Community Implications**

7.1 The Strategy helps to ensure that the Council responds to the needs of all of its customers in ways that they expect those needs to be addressed. The Strategy drives improved access across the range of different channels and enables the Council to provide these in the most cost effective and appropriate manner.

7.2 The Strategy will develop the range of access channels ensuring that Customers can expect that their enquiry will be answered quickly and efficiently at the first point of contact regardless of the time of day.

**8.0 Conclusions**

The Customer Access Strategy will over the next three years drive forward:

- Bringing together all of the first point of customer contact into a single central contact point.
- Delivering a consistently high level of customer service, aimed at satisfying a request at the first point of contact.
- Delivering the most cost effective access channel which meets the customer's needs.

**9.0 Background Papers**

Appendix A - Customer Access Strategy 2012 – 2015
Appendix B - Holistic view of our customers
Appendix C - Governance Arrangements
Appendix D - 2012/13 Improvement Plan

Research Analysis Report

# Appendix A - Customer Access Strategy

To drive forward improvements in Customer Services it is proposed that the Council adopts this Strategy. Underpinning this are three strategic objectives.

**Customer Service Strategic Objectives**

The strategic objectives to be achieved through the Customer Access Strategy are:

1. Bringing together all of the first point of customer contact into a single central contact point.
2. Delivering a consistently high level of customer service, aimed at satisfying a request at the first point of contact.
3. Delivering the most cost effective access channel which meets the customer's needs.

**The Strategy**

**What does it look like?**

The diagram below highlights the expected and desired shift that will need to take place to deliver against the strategic objectives.
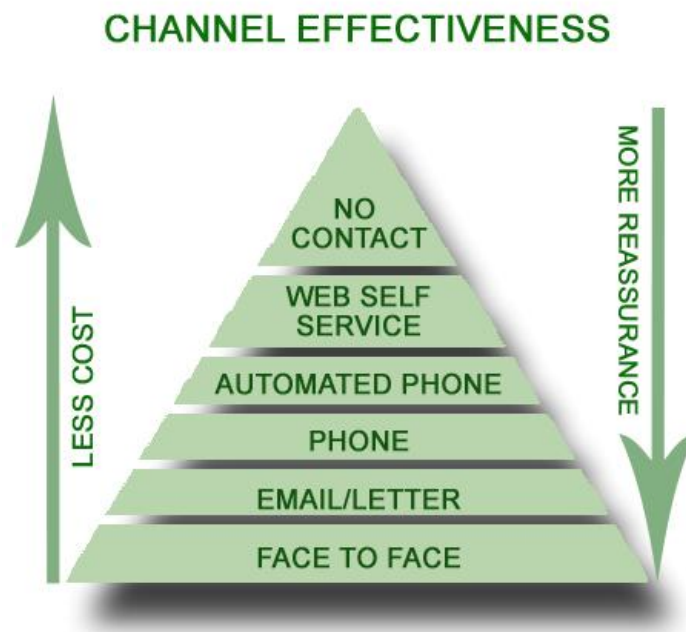


Customer contact and access will be shifted towards the top of this triangle as this is the most cost effective route and this will be supported by technology enablers such as the development of the web, CRM and other methods of self service.

An effective approach to this channel shift will reduce demand on high cost entry points by providing relevant information and enabling lower cost self service for applicable services and information.

This will enable the Council to shift transactions onto self service platforms, for example, automated and standardised payments.

For example, to move from resource intensive face to face service delivery to telephone or from telephone to self service via transactional web services. The development of other contact channels like text messaging and e-forms will also support this.

Where a specific contact cannot be delivered through an access point or requires more individual support, it will be offered through the channels at the base of this triangle through the single central contact point.

The Strategy recommends using the most cost effective method to engage customers, the type of engagement best supported by each channel and the way channels interact with each other. Consistency of information and service provision are important and will give the Council the ability to analyse channel usage and provide a better understanding of customer behaviour and preferences.

This plays a key part in helping to achieve the long term vision to transform the Council, this vision is shown in the diagram below.
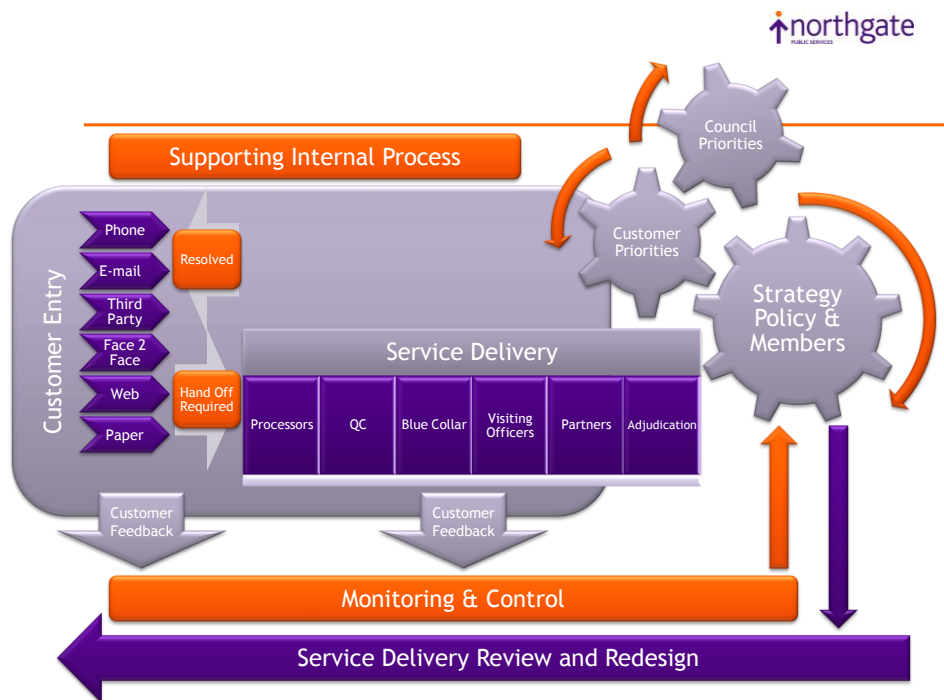


### (1) Consolidate customer facing functions together

The first phase of the strategy will involve the consolidation of all customer services function into the contact centre by bringing together all elements of customer service from across the Council. This will help to establish together a level of consistency for all customers when dealing with the Council.
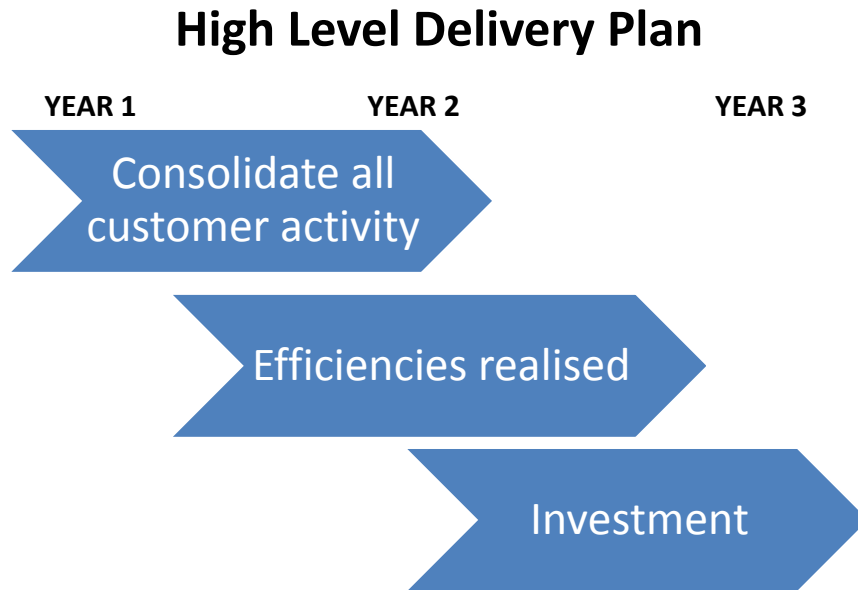
### (2) Make efficiency improvements

The second phase of the strategy will be to move to an integration of customer and process to deliver a customer focussed service. This will build on the work being done through the ongoing programme of service reviews. This will be established through

standardised systems and processes driving up the quality of the customer experience while freeing resources for services to deliver high quality services.

**(3)  Invest in channel development**

The final phase will see a shift of a wider range of Council service to a self serve delivery mechanism through the development of web site, SMS and other technology. There will need to be an investment in the development of systems across the whole organisation. These will include systems such as a common appointment system, CRM, electronic document management and the website. These will enable us to meet the needs of customers over the next 5/10 years.

# High Level Delivery Plan

| YEAR 1 | YEAR 2 | YEAR 3 |
|--------|--------|--------|

Consolidate all customer activity

Efficiencies realised

Investment

**Governance Arrangements**

It is proposed that a Project Board is set up to deliver the strategy.  This Board should be led by the Director of Operations and a Member Champion. The membership of this group should include representatives from the Council and Northgate Public Services. An officer from the Council will also work with Northgate Public Services to drive the delivery of the Strategy.

# Appendix B – Research completed to gain a holistic view of our customers

## No. of Visits to Customer Svs. Desk
## 2008 - 2012

Y-axis: No. of Visits (0 to 30,000 in 5,000 increments)

Data points:
- Sep-Mar 2008/9: 14,889
- Apr-Mar 2009/10: 22,802
- Apr-Mar 2010/11: 27,740
- Apr-Jan 2011/12: 18,577
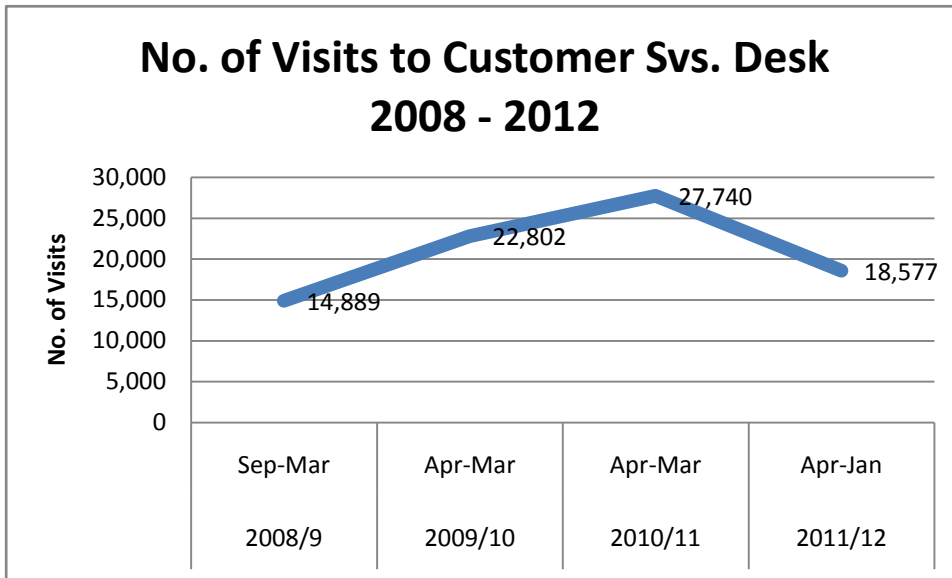
At the point of initiation of the Northgate contract (Aug 2010) and the consolidation of the Service Desk and Revenue and Benefits face to face functions, Customer 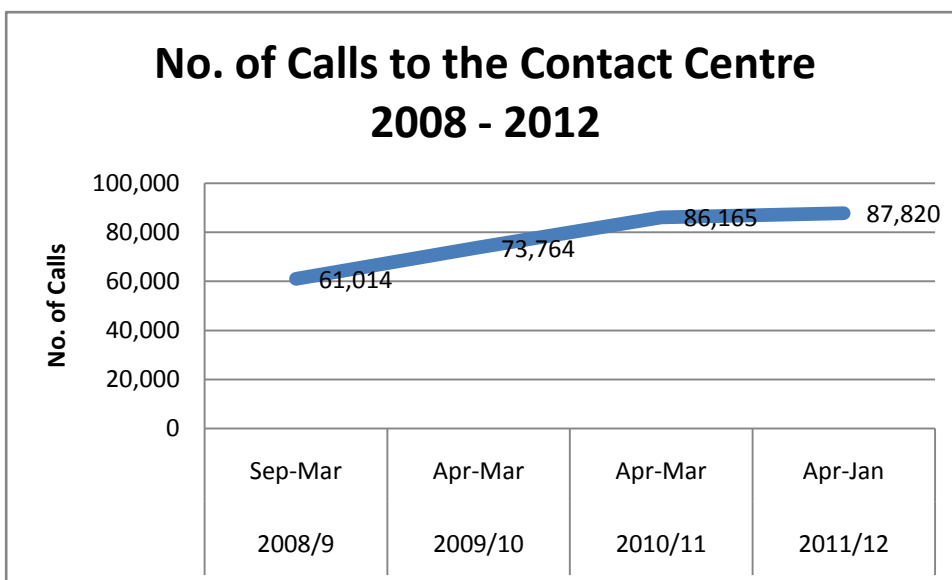Services saw an immediate rise in the level of visitors to the Service Desk.  This rise was addressed by the implementation of performance initiatives including system reviews, process re-engineering and staff training and development.  As a result of these initiatives customer visits have reduced with customers now accessing services through different channels, customer experience has improved and the Council's performance in these service areas has increased.

## No. of Calls to the Contact Centre
## 2008 - 2012

Y-axis: No. of Calls (0 to 100,000 in 20,000 increments)

Data points:
- Sep-Mar 2008/9: 61,014
- Apr-Mar 2009/10: 73,764
- Apr-Mar 2010/11: 86,165
- Apr-Jan 2011/12: 87,820

The picture for telephone calls is much the same, with the trend increasing until midway through 2010.  Customer Service initiatives such as resolving queries at first point of contact, supporting customers to use alternative channels to access information where appropriate e.g. website and advising customers to change to Direct Debit to pay for services have all had an impact on reversing the trend.  We can further reduce the amount of calls taken by providing more information and access to services through different

channels e.g. website, SMS etc. A review of the website is already underway and Housing Services are piloting the use of SMS with some success.

**We are taking more payments direct electronically from customers**

| | Sep-Mar 2008/9 | Apr-Mar 2009/10 | Apr-Mar 2010/11 | Apr-Jan 2011/12 |
|---|---|---|---|---|

*No. of Payments* — lines showing Cash, Card, and Cheque over the four periods.
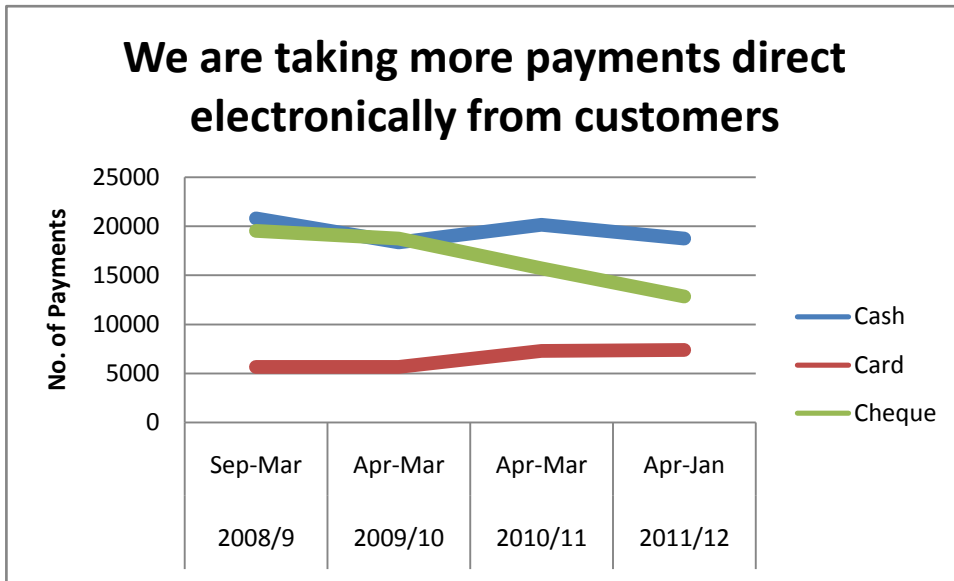
Customers are increasing their use of the Customer Services team and automated payment line to make electronic payments for services. The reduction of cash and cheque payments can be attributed to the Direct Debit initiative that successfully converted over 1000 residents to switch to this method of payment. However there is more that we can do to reduce the unnecessary administration of handling cash and cheques. We need to increase the conversion rate to Direct Debit, review the use of the automated payment line, including addressing customer feedback of this service and review how customers could use the website to pay for services.

**This is how our customers get in touch with us (592,141 contacts)**

- 1%
- 42%
- 40%
- 17%

- 236,709 Telephone Calls
- 101,184 Customer Visits
- 250,144 Website Views
- 4,104 Correspondence
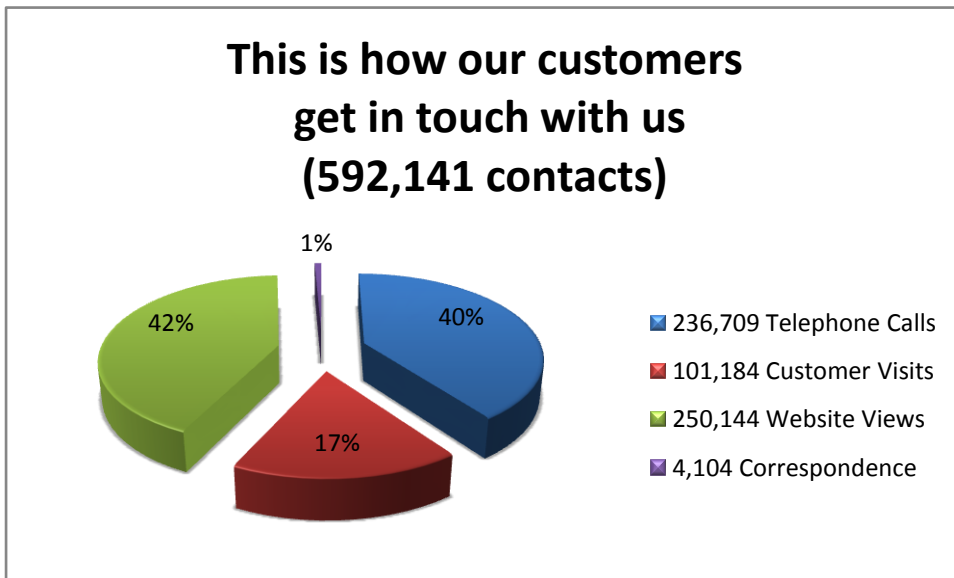
During the period April 2011 – January 2012*, the Council was contacted 592,141 times by members of the public through various media channels. The most popular channel was the website, with Planning Services accounting for 37% of these views followed by Community & Leisure Services with 26% of views. This is no coincidence, as Planning Services have successfully provided access via the website to a range of the services available including the submission of plans. Community & Leisure Services have also

realised the benefits of including the most frequently requested information on the website. The website review will work with all services to identify transactions that could be delivered via the website, which will meet demand to make services more accessible at our customer's convenience.

\* Correspondence figure for Revenue and Benefits Service only.

**Public Access by Service Area 2010 - 2011**

- General Enquiries — 3%
- Customer Services — 26%
- Environmental Services — 9%
- Housing — 16%
- Corporate Services — 6%
- Community & Leisure — 16%
- Planning & Building Control — 21%
- Environmental Health — 3%
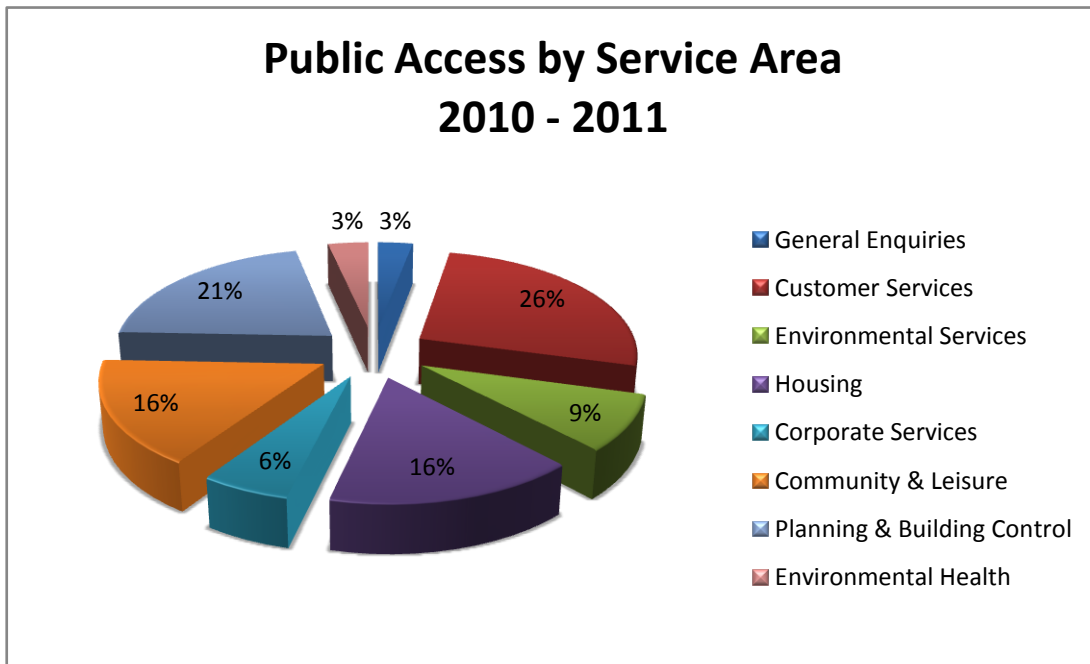
During the period April 2011 to January 2012, members of the public accessed the Council for a variety of services. Over a quarter of customers need to access Customer Services, which incorporates Revenue and Benefit Services. At present customers can only enter into dialogue or process transactions by visiting the Civic Offices or by telephoning the Contact Centre, both of these media represent a high cost to the Council. Online options such as live-chat, e-payments, booking appointments etc. could be provided as alternatives to visits and calls especially when progress chasing requests.

## Customers visit us to access ...



- Main Reception — 16%
- Customer Services — 27%
- Environmental Services — 10%
- Housing — 8%
- Corporate Services — 9%
- Community & Leisure — 12%
- Planning & Building Control — 8%
- Environmental Health — 10%
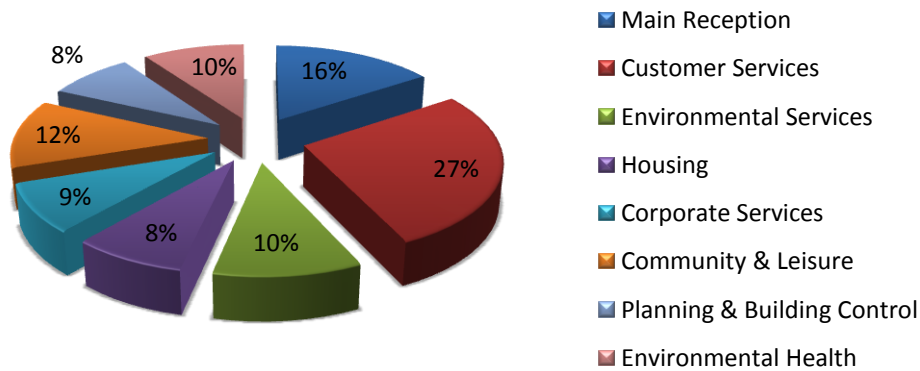
## Customers call us to access ...



- Main Reception — 6%
- Customer Services — 47%
- Environmental Services — 5%
- Housing — 28%
- Corporate Services — 4%
- Community & Leisure — 6%
- Planning & Building Control — 4%
- Environmental Health — 0%
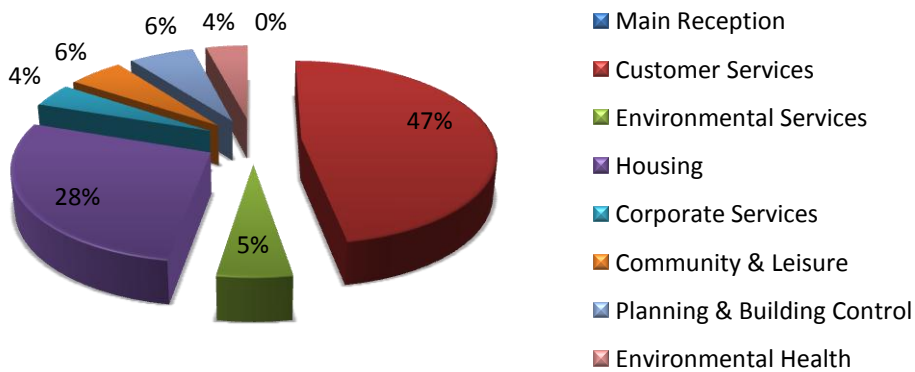
## Customers use the website to access ...



- Customer Services — 10%
- Environmental Services — 10%
- Housing — 11%
- Corporate Services — 6%
- Community & Leisure — 26%
- Planning & Building Control — 37%
- Environmental Health
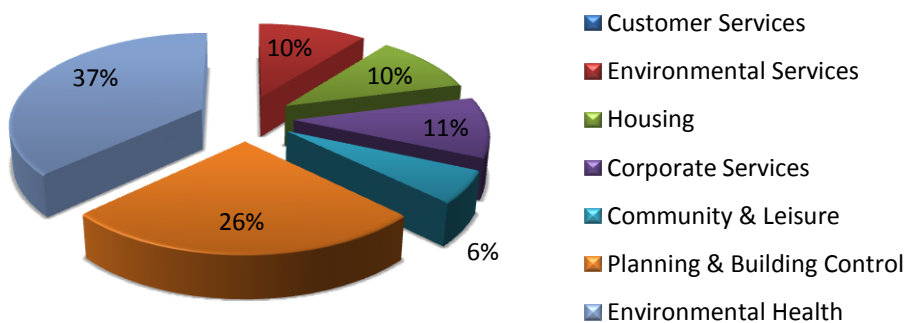
What customers contact the Council for varies depending on their access channel. The majority of face to face enquiries are for revenue and benefit services as you would expect for a personalised service. Telephone calls incorporate payments for services, housing repairs and revenue and benefit enquiries. Customers accessing planning services and community and leisure services predominantly use the website for their enquiries.

## We have looked at whether any of these contacts can be avoided



During the period September 2010 - August 2011, the Council received 3,316 contacts that could have been avoided. Over one third of these contacts were due to poor signposting at initial contact, and over a quarter for clarification which should have been provided at the first contact. A review of how our services are publicised will identify the options available to the Council to minimise the rate of avoidable contact e.g. publicising numbers of the website to direct people to the correct provider, introduction of call management to filter calls and re-direct customer enquiries, improved staff training and development etc.
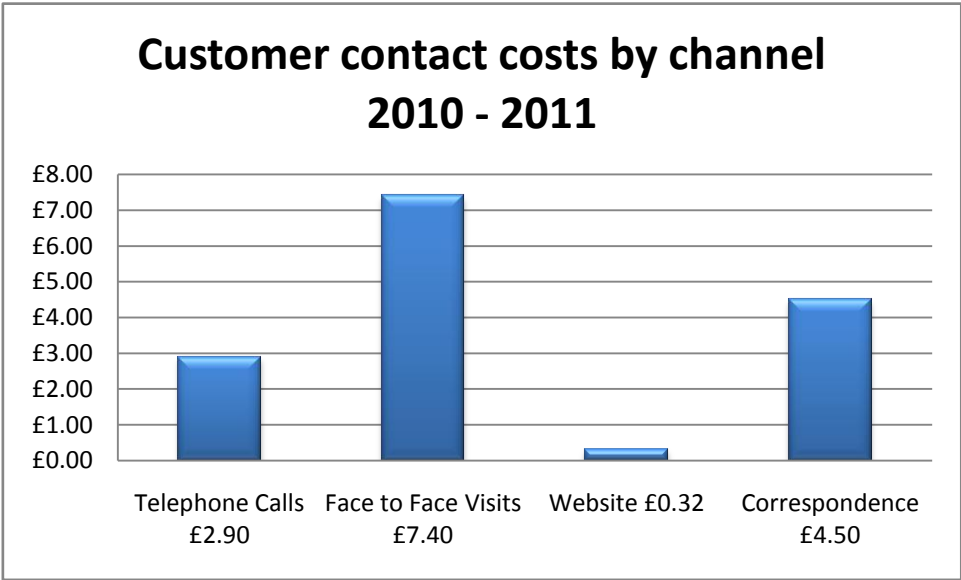
## These are the services customers contacted when they could have been avoided
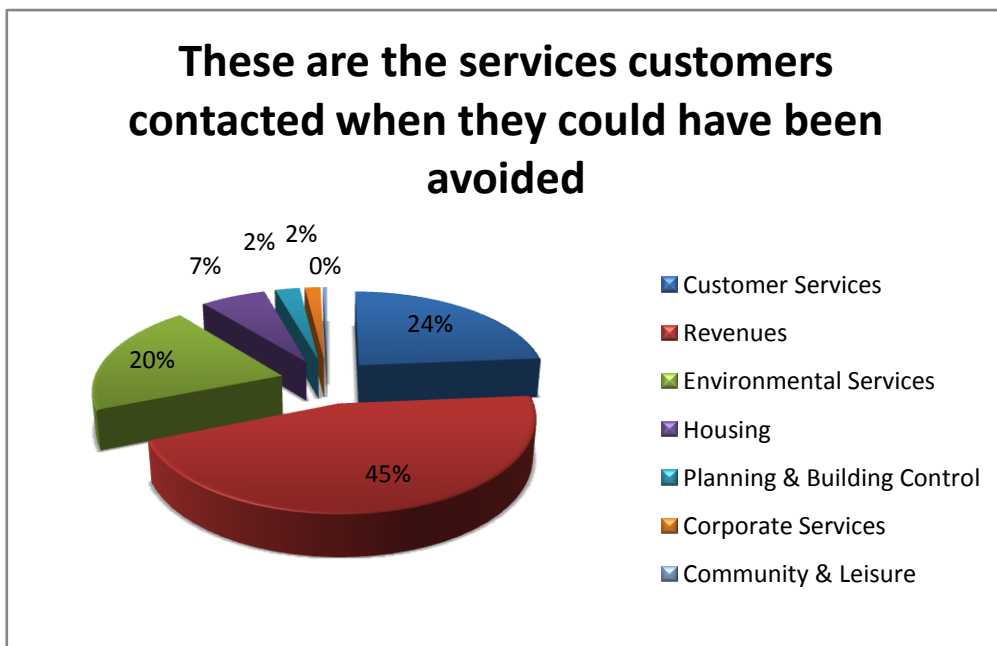


Nearly half of all avoidable contact occurs within the Revenues Service where customers require a more personal service. Over one third of these contacts were due to unnecessary clarification at initial contact, and over a quarter were repeat contacts where queries had not been resolved in the first instance. Customer Services and the Revenue and Benefits teams have set targets to reduce avoidable contact and improve performance for query resolution at initial contact.

## Customer contact costs by channel 2010 - 2011



| | |
|---|---|
| Telephone Calls £2.90 | Face to Face Visits £7.40 |
| Website £0.32 | Correspondence £4.50 |

The cost of face to face contact is 23 times higher than the website, 2.5 times higher than a telephone call and 1.6 times higher than dealing with correspondence. We should be providing more services and information on the website and make it easy for customers to use this channel to self-serve. There will always be a need to provide a customer facing service, but we could provide more self-serve booths in these areas. By providing other channels and signposting customers to use these we can increase choice and reduce costs.

### 5 years ago



3%
25%
27%
45%

### Now



3%
46%
18%
33%

### The future



2%
24%
62%
12%

- Telephone Calls £2.90
- Face to Face Visits £7.40
- Website £0.32
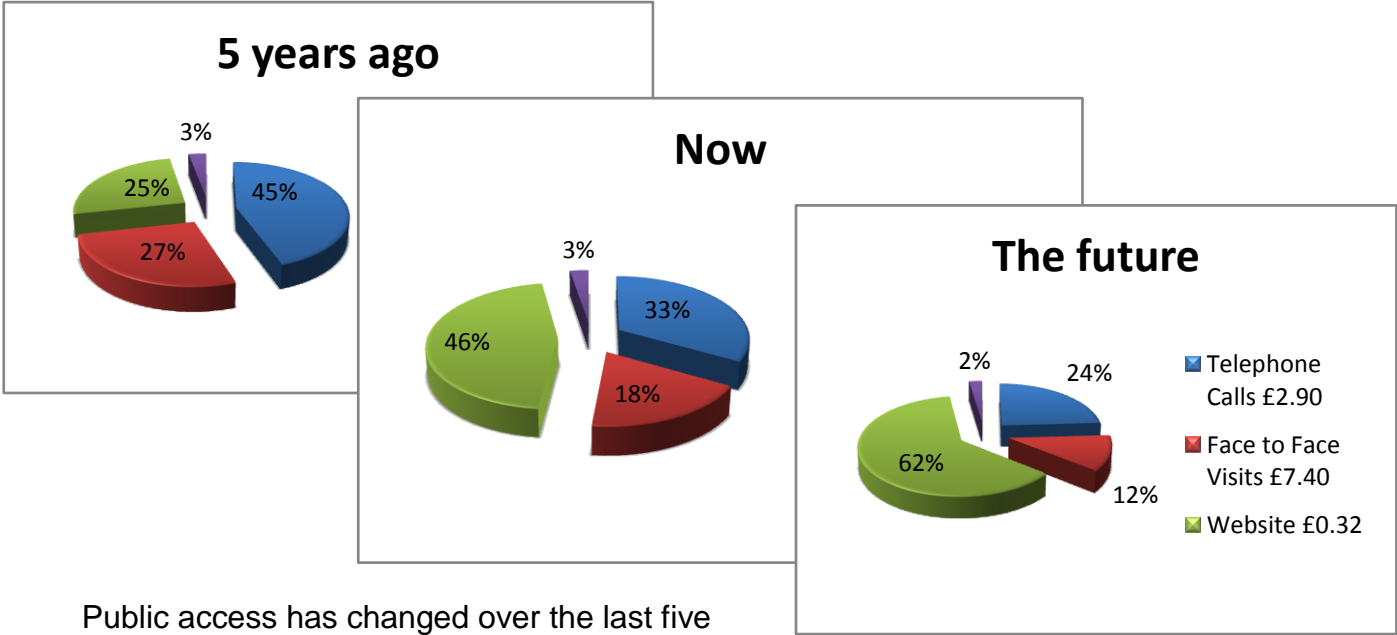
Public access has changed over the last five years and will continue to change over the next five years as customers demand more choice over how and when they contact the Council. We need to provide our customers with choice and control over how they engage with us and make it as easy as possible to use value for money channels such as the website, SMS, apps etc.

* The cost of online channels is likely to decrease due to increased availability and uptake of online and mobile technologies. The reverse is likely for traditional communication channels involving human interaction.

# Appendix C – Project/Governance Arrangements

This project will work within the project governance arrangements agreed in advance with the Council. A successful project will be delivered by the Council and Northgate working in partnership together show in the mechanisms below and this will be supported by a well-defined and effective Communication Plan.

The arrangements will be based on the following structure.

**Project Board Membership**

| Project Board | | | | Date: | |
|---|---|---|---|---|---|
| Name | Email | Tel | Location | Role | Role within Project Board |
| **Membership** | | | | | |
| | | | | | Member Sponsor |
| | | | | | Board Member |
| | | | | | Board Member |
| | | | | | Board Member |
| | | | | | Board Member |
| | | | | | Delivery Group chair |
| **Notes** | | | | | |
| Project Board Membership and meeting frequency to be determined at first meeting. Trade Union representation would be expected at certain meetings during the project which would be determined by the Board. | | | | | |

**Delivery Group**

| Delivery Group | | | | Date: | |
|---|---|---|---|---|---|
| Name | Email | Tel | Location | Role | Role within Delivery Group |
| **Membership** | | | | | |
| | | | | | Delivery Group chair |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| | | | | | Work stream lead/s |
| **Notes** | | | | | |
| Delivery Group membership and meeting frequency to be determined at Project Board initial meeting. | | | | | |

**Work stream Group**

| Work stream Group | | | | | Date: |
|---|---|---|---|---|---|
| Name | Email | Tel | Location | Role | Role within Work stream Group |
| **Membership** | | | | | |
| | | | | | Work stream lead |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| | | | | | Partnership representative |
| **Notes** | | | | | |
| Work streams to be identified at first Delivery Group meeting and this will identify membership of each group and meeting frequency. | | | | | |

The Communications Plan will cover:

- Roles and Responsibilities;
- Escalation paths;
- Frequency of meetings;
- Reporting mechanisms, including risks and Issues;
- Change control;
- Documentation.

| Communication Matrix | | | |
|---|---|---|---|
| **Type** | **Who** | **Frequency** | **Where** |
| **Project Kick-off** | Project Board Members | At Initiation | Council Offices |
| **Project Board Meeting** | Project Board Members, Delivery Group chair | Bi-Monthly | Council Offices |
| **Delivery Group Meetings** | Delivery Group Members and work stream leads | Monthly | Council Offices |
| **Work stream Meetings** | Work stream lead and group members | Monthly | Council Offices |
| **Ad-hoc issues resolution** | Delivery Group Members with Project Board sign off | Ad-hoc as agreed by the Delivery Group chair | Telephone or Council Offices or as agreed |

# Appendix D – 2012/13 Improvement Plan

| 2012/13 IMPROVEMENT PLAN | OWNER | Apr12 | May12 | Jun12 | Jul12 | Aug12 | Sep12 | Oct12 | Nov12 | Dec12 | Jan13 | Feb13 | Mar13 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Strategy presented at F&M Committee** | MG | █ | | | | | | | | | | | |
| **Governance Arrangements** | | | | | | | | | | | | | |
| Member Champion appointed | F&M PC | █ | | | | | | | | | | | |
| Project Board set up | Partnership | █ | | | | | | | | | | | |
| Delivery Group set up | Partnership | | █ | | | | | | | | | | |
| Project Board meetings (Bi-monthly) | Partnership | | █ | | █ | | █ | | █ | | █ | | █ |
| Delivery Group meetings (Monthly) | Partnership | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |
| Work stream groups (Monthly) | Partnership | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |
| **Research/Engagement** | | | | | | | | | | | | | |
| Research | Partnership | | | | | | | | | | █ | █ | |
| Further engagement with customers | Partnership | | | | | | | | | | | █ | █ |
| **Customer access requirements (Work stream 1)** | | | | | | | | | | | | | |
| Methodology established | Partnership | | █ | | | | | | | | | | |
| Roles identified | Partnership | | █ | | | | | | | | | | |
| Analyse impact on Front Line Services | Partnership | | | █ | █ | █ | █ | | | | | | |
| Identify customer facing elements | Partnership | | | | | | █ | █ | █ | █ | | | |
| Service transformation | Partnership | | | | | | █ | █ | █ | █ | | | |
| Workforce arrangements | Partnership | | | | | | | | | █ | █ | | |
| **Communications (Work stream 2)** | | | | | | | | | | | | | |
| Internal - meetings, emails, newsletters | Partnership | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |
| External - wider media | Partnership | | █ | | | | | | | | █ | █ | █ |
| **Technology (Work stream 3)** | | | | | | | | | | | | | |
| Phone | Partnership | | | | | | █ | █ | █ | █ | █ | █ | █ |
| CRM | Partnership | | | | | | █ | █ | █ | █ | █ | █ | █ |
| Website Review | Partnership | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |
| Business Process Re-engineering | Partnership | | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |
| Other Technology | Partnership | | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ |