

## **Future Guildford Customer Case and Parking – January 2022 Update**

Future Guildford has provided a new operating model for our customer facing teams. With the introduction of Salesforce (CRM), our new corporate website and MyGuildford customer portal in Q1 this year, GBC now has a suite of integrated digital tools which support the model, enabling self-service transacting for residents and businesses as well as improving efficiency and delivering automation for back-office teams.

As part of the technology changes, a fundamental review of the website was carried out. It found that our existing website made it problematic for people to find what they needed, we had some accessibility improvements to make, information wasn't logically grouped, digital journeys were poorly designed, and the content and language was excessive and "jargon heavy" respectively.

### **The new website launched on 29 April and the following improvements were implemented:**

- ✓ Complete redesign of the website to improve the customer experience and encourage channel shift
- ✓ Removed "mega-menu" and replaced with clear top tasks and prominent search bar
- ✓ Standardised and consistent page design
- ✓ Customer-centric content using Plain English and checked for readability levels
- ✓ Long pages broken up into clear customer journey templates
- ✓ Clear call to action buttons implemented
- ✓ Knowledge articles to support self-service
- ✓ Icons used across the site to help people with reading difficulties
- ✓ Reduction in webpages using web analytics and prioritisation
- ✓ Website seamlessly links with the new Salesforce customer portal (MyGuildford), providing an excellent customer journey

### **The website is still a work in progress and the web team are now focussing on further improvements:**

- Digital estate accessibility review, to ensure all of our digital services can be accessed by all
- Better search functionality – including voice search
- "How to" videos for key online services – to help customers with the new functionality and further improve channel shift
- Customer journey tracking so we understand where journeys fail
- PDF review and rationalisation
- Heritage digital platform migration
- Form updates to comply with GDS standard

### **With the new website in place, we've also been able to integrate web forms for service requests to the Salesforce platform, either via the MyGuildford portal or the website itself. Customers can:**

- ✓ Report an issue e.g. Abandoned Vehicles, Graffiti etc (geo-located functionality)
- ✓ Report Missed collections (household/commercial)
- ✓ Order & pay for new or replacement bins
- ✓ Order new bin/sacks (commercial)
- ✓ Make an MOT booking

### **Integrations have been built between Salesforce and other business applications such as Bartec (waste) and Civica (benefits) which enables:**

- ✓ Customers to link MyGuildford to their benefits account using a single sign on
- ✓ Automatic Service request creation in Bartec based on a Work Order created in Salesforce
- ✓ Availability of Real time information relating to Bin Rounds
- ✓ Automatic creation of OpenRevs e-billing account
- ✓ Change of circumstances workflow – Address and name change
- ✓ Set up of paperless Direct Debits for council tax payments

**With MyGuildford, key customer services can be accessed via a personalised Salesforce customer portal, customers benefit from:**

- ✓ The convenience of being able to carry out an increasing number of tasks in one place
- ✓ Improved journeys that remain digital from start to completion
- ✓ Notifications which provide updates on service delivery

**The journey with Salesforce has just started and we are now focussing on future activities to ensure we gain best value from our investment in this technology:**

- Developing the future roadmap for digital services
- Considering whether Salesforce can provide the solution for a range of GBC's requirements
- Refining the current platform to reduce manual intervention in digital processes
- Progressing with further integrations, such as HeyCentric Payments
- Developing an in-house Admin team to ensure the system is operating safely and efficiently

**With service requests creating cases in Salesforce, we have a clear understanding of what residents and businesses are contacting us for. Our response to some requests is fully automated, but the bulk are now managed by the newly expanded Customer Services team using Salesforce. This team benefits from:**

- ✓ Omni-Channel Integration – all work is managed through a single system
- ✓ Automated case categorisation and work-order management
- ✓ The ability to create queues of cases to be managed by the appropriate service teams
- ✓ Having Salesforce identify a known customer when they call
- ✓ Knowledge Articles as a tool to assist with First Contact Resolution
- ✓ Granular reporting which offers insight into customer touchpoints
- ✓ Dashboards providing real-time information that can track team, service and channel performance

**We've also made headway managing customer expectations on service delivery, which in turn reduces failure demand (i.e. when a customer chases us for updates). Several initiatives have been implemented over the last few months or are in the pipeline:**

- ✓ Auto-responses from digital service requests (webform & email) which accurately reflect delivery timeframes
- ✓ Improved information on the website regarding application processing times
- ✓ The ability to identify and communicate with "same case" customers using Salesforce
- ✓ Replacing [customerservices@guildford.gov.uk](mailto:customerservices@guildford.gov.uk) with a General Enquiry webform
- ✓ New IVR (phone routing & queuing system) that improves journeys to the right skilled agent and provides opportunities for targeted messaging (early 2022)
- ✓ Digital communications campaign promoting our website and portals
- ✓ Digital & service support guidance for Councillors (Early 2022)
- ✓ An internal comms campaign to strengthen the "one organisation, one customer" approach

**In terms of our performance, nearly all council service teams are experiencing a significant increase in demand, meaning that contact to Customer Services is higher than we'd like or expect. Volumes have been impacted by several external factors, such as delays with the supply of garden waste bins, the change in our housing allocation system and unprecedented demand on planning services. We have also experienced challenges recruiting in customer services reducing the capacity available to meet this demand. Despite this we're continuing to see improvements and in December:**

- ✓ Average call wait times was 4.5 minutes
- ✓ Percentage of calls answered within 20 seconds was 57%
- ✓ Case volumes have reduced from 4,000 at its peak to less than 300
- ✓ Cases resolved at first point of contact in December was 76%

**The team are becoming more efficient and are “doing more” which is a platform we can build upon. What is equally pleasing is the take up for digital self-services from residents and businesses:**

- ✓ Over 18,000 customers have signed up for a MyGuildford account
- ✓ 80% of customers who have contacted us via Customer Services now have a MyGuildford account
- ✓ Over 54,000 cases have been processed through Salesforce
- ✓ Over 7,500 customers are using OPENPortal (benefits) accounts
- ✓ Over 65% of cases have been generated through digital channels (webforms & email)

**To ensure this trend continues, we’re planning a comms campaign which will promote MyGuildford both within GBC and to our residents and businesses over the coming months.**

**Alongside Customer Services, Future Guildford delivered a new Case Management team to work across all service areas, processing rules-based applications. The team has bedded in well, however concerns remain that the team is under-resourced as most Case areas are experiencing significant backlogs:**

- Planning validation (4-week delay)
- Council tax cases ( 2000 outstanding cases)
- Business rates & benefits applications ( 1000 outstanding cases)
- Parking - PCN challenges (28 days delay)

**The model requires an *Average* number of FTEs as well as a *Resilient* FTE headcount in Case to respond to expected customer demand. This is problematic to achieve and represents a risk to service delivery since:**

- We are not yet in a position to baseline “normal” service volumes, so cannot validate the *Average* FTE
- Both Exchequer Services and Housing have indicated the *Average* FTE may be lower than the actual requirement
- The amount of training required to move from *Average* (42.5 FTE) to *Resilient* (81 FTE) is significant and potentially unrealistic
- With all Case teams in a backlog situation, we don’t currently have the capacity to train or be trained
- With some Case teams (Benefits, Planning, for example) the training requirement may outweigh the benefit

**We’re investing time and effort engaging with the team to work our way through these issues and as a mechanism for maintaining a positive working environment. Our focus is also shifting from transition activities towards performance management. For both Customer & Case we’re:**

- Validating SLAs for service delivery
- Refining the end-to-end customer journeys which stretch to other service teams
- Developing KPIs for each team which accurately reflect achievable targets and link to service SLAs
- Collecting feedback from our teams to help us improve
- Introducing Champions to work with services to identify and respond to operational risk and issues
- Refining the grading structure at CSA & CSO level to build resilience and improve morale

**Overall I’d judge the general feeling within both Customer and Case as “happy but exhausted” - as well as high volumes of work, Covid has a significant impact on all of us. Significant improvements have been made over a short space of time and there is still much to do. Most of the team are unused to being managed via a system of SLAs and KPIs, so we are very much mindful that this behavioural change needs to be seen as a positive step towards further improving service delivery – something we know the team is keen to achieve.**