

## APPENDIX B: CUSTOMER SERVICE PEER REVIEW ACTION PLAN

The recommendations of the review team are set out below, with proposed actions, target dates and the officer or service are responsible.

	Action	Date	Responsible Officer
<b>Leadership:</b>			
There is a need for a clear shared vision and overarching strategy for improving customer service.	Develop a Customer Service Strategy incorporating the existing strategies and Peer Review recommendations.	Draft strategy to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Customer Services Manager
The council would benefit from clearly setting out its core values as an organisation, this would provide a valuable context for the provision of customer services			
The Customer First Strategy Group would benefit from reviewing its role, membership and terms of reference			
The council should consider the role of the Policy and Resources Scrutiny Committee in review and development of Customer First			
A business case is required to set out the rationale for change, the risks and resources required for implementation of Customer First	Update 2006 resources plan based on the new strategy	Draft plan to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Customer Services Manager
<b>Corporate approach to customer access and delivery:</b>			
More communication and engagement is required to ensure there is a consistent understanding of the importance of customer care by staff across all services	Customer Care issues to be integrated into Corporate Induction Training	TBA	Organisational Development Manager
	Develop Communications plan for Customer Services Strategy	TBA	Communications Manager

	Issue to be dealt with in Corporate Customer Care Training Programme.	Ongoing programme	Corporate Customer Services Manager
Customer Service Charter and Customer Care Standards would benefit from being sharpened up and their profile raised with staff and the general public	To be considered as part of the development of future standards (already in workplan)	Ongoing programme to be completed by end of 2009	Corporate Customer Services Manager
	Raising of profile to be included in Communications plan	TBA	Communications Manager
The extent to which each service can be dealt with at the first point of contact needs to be defined and communicated to staff	These issues are dealt with as part of the ongoing BPR process as services are transferred or reviewed.	Ongoing programme	Corporate Customer Services Manager/ IT Development Manager
A clear plan is required for developing and delivering the transactional elements of the website, linked to the plans for face to face Customer First centres and the contact centre.	A forward workplan for the transfer of services to the contact centre and the parallel development of transactional web services to be agreed.	Initial workplan to be presented to Customer First Strategy Group in February  <b><i>(Task completed)</i></b>	Corporate Customer Services Manager/ IT Development Manager
A more co-ordinated approach is required for outreach and home services	Report indicating current position and proposals to be submitted to Policy and Resources Scrutiny Committee	Policy and Resources Scrutiny Committee September 2009	Corporate Customer Services Manager
<b>Understanding and Engaging with Customers:</b>			

<p>The council should develop a better understanding of it's customers by analysis of the socio-demographics, lifestyles, culture and behaviour of their customers. This will help define who the customers of Caerphilly are, how they would prefer to access the services of the council and then inform the development of council services to meet these needs.</p>	<p>Report indicating current position and proposals to be submitted to Policy and Resources Scrutiny Committee</p>	<p>Policy and Resources Scrutiny Committee. September 2009.</p>	<p>Corporate Customer Services Manager/ Policy and Research Manager</p>
<p>Greater use of life events to help sign post customers to related services delivered by the council or other public sector agencies</p>	<p>To be considered as part of the ongoing BPR process</p>	<p>Ongoing programme</p>	<p>Corporate Customer Services Manager/ IT Development Manager</p>
<p>A more consistent approach to analysing and learning from complaints and compliments needs to be applied and shared with staff and customers.</p>	<p>Changes to the complaints process have already been considered by the Customer First Strategy Group.  Proposals to be presented to Policy and Resources Scrutiny Committee.</p>	<p>Policy and Resources Scrutiny Committee June 2009</p>	<p>Corporate Customer Services Manager</p>
<p><b>Service redesign:</b></p>			
<p>The council would benefit from reviewing out of hours service provision across the council and how this could be integrated with the contact centre</p>	<p>Report indicating current position and proposals to be submitted to Policy and Resources Scrutiny Committee</p>	<p>Policy and Resources Scrutiny Committee. September 2009.</p>	<p>Corporate Customer Services Manager</p>
<p>Start to use techniques such as Customer Journey mapping and emotional journey mapping to help improve service delivery and design.</p>	<p>To be incorporated into the BPR and Service Transfer plan.  Progress to be reported to the Customer First Strategy group</p>	<p>Ongoing programme</p>	<p>Corporate Customer Services Manager</p>

The council should carefully consider how it will increase the resource devoted to BPR	TBA	TBA	IT Development Manager
A decision is required as to the corporate BPR methodology to adopt	Options to be discussed with BPR team	TBA	IT Development Manager
Consider a single phone number	To be considered as part of the Customer Services Strategy	Draft strategy to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Customer Services Manager
<b>HR and organisational development</b>			
Ensure that the plans to deliver customer care training to significant numbers of staff across the authority are realised. This will help to embed customer focus, raise customer satisfaction levels and help to build capacity across the organisation to deliver customer services.	Tenders for training contract currently being evaluated.	Contract to be in place and training being delivered by April 2009. <b>(Contract in place)</b>	Corporate Customer Services Manager
The induction process would benefit from a refresh to include a greater emphasis on customer care	Customer Care issues to be integrated into Corporate Induction Training	TBA	Organisational Development Manager
The council should review the management of customer facing staff, including job descriptions, so that they include the customer care responsibilities, competencies and staff management practices currently being trialled in Customer First.	Review to be undertaken and proposals developed in a report for Policy and Resources Scrutiny Committee	Policy and Resources Scrutiny Committee TBA	Organisational Development Manager
Progress in implementing the PDR system needs to be accelerated and embedded	In place	On going	Head of Human Resources and Organisational Development
<b>Programme management:</b>			
Develop a clear business case to support the proposed overarching customer service and channel access strategies.	Update 2006 resources plan based on the new strategy	Policy and Resources Scrutiny Committee June 2009	Corporate Customer Services Manager

<b>ICT and IM strategies:</b>			
Update the ICT Strategy so that it takes full account of all aspects of the developing Customer Service Strategy, Channel Access Strategy and the “Agile Working” agenda as well as the other needs of the various departments of the council.	Updated IT strategy developed	TBA	Head of ICT&P
A clear and agreed plan is required to build transactional functionality into the website similar to the plan which is in place for the development of the contact centre	A forward workplan for the transfer of services to the contact centre and the parallel development of transactional web services to be agreed.	Initial workplan to be presented to Customer First Strategy Group in April. <b>(Task completed)</b>	Corporate Customer Services Manager/ IT Development Manager
Need to improve the dedicated or personalised information for elected members on the website	Project to be developed by IT Development Manager	TBA	IT Development Manager
Consider a policy of Web First to ensure that this channel is promoted to deliver efficiency savings	To be considered as part of the Customer Services Strategy	Draft strategy to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Customer Services Manager
Responsibilities for web content should be reviewed to ensure ownership from all service areas so that service information is up to date and accurate	To be considered as part of the Customer Services Strategy	Draft strategy to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Customer Services Manager/ IT Development Manager/ Communications Manager
Consider a data warehousing facility to improve value and use of customer insight.	To be considered as part of IT Strategy	TBA	IT Development Manager
Explore ways to accelerate CRM integration	To be considered as part of the workplan for the transfer of services to the contact centre and the parallel development of transactional web services to be agreed.	Report to Policy and Resources Scrutiny Committee June 2009	Corporate Customer Services Manager/ IT Development Manager

<b>Accommodation / property strategy:</b>			
The Asset Management Strategy would benefit from a refresh to include an Accommodation Rationalisation plan outlining the forward plans for rationalisation and utilisation of council buildings. This will ensure that council buildings are conducive to delivering excellent customer service.	Initial objectives of accommodation rationalisation to be considered in Customer Services Strategy	Draft strategy to be considered by Policy and Resources Scrutiny Committee June 2009.	Corporate Property Manager
	Accommodation rationalisation plan to be developed by Corporate Property Manager	TBA	Corporate Property Manager
The proposals to refurbish the reception area of the Pontllanfraith offices should be finalised.	Proposals to be brought to Cabinet	TBA	Corporate Property Manager
Improve the signage on the highways to Ty Penallta and the signage inside Penallta House to ease customer access.	To be considered by Facilities Management	TBA	Corporate Property Manager
<b>Communications strategy:</b>			
The council should launch a corporate newsletter to convey key corporate messages, such as the importance of a customer first ethos, across the organisation	To be included in the Customer Services communications plan	TBA	Communications Manager
There is an opportunity with the re-writing of the communications strategy to improve internal and external communications	Write new corporate Communications Strategy	TBA	Communications Manager
Ensure a more consistent look and feel to the branding and including the council name, to help to build staff and customer awareness of the Customer First programme.	Branding to be reviewed and proposals brought to the Customer First Strategy Group	By Sept 2009	Corporate Customer Services Manager / Communications Manager