

# Customer Services Strategy 2006 - 2009



*Facing the challenge*

**Building for excellence - a programme for change**

**West Lothian Council** delivers

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**UK Council  
of the Year  
2006**



**West Lothian's vision** for customer service over the next three years is to provide better access to improved public services in West Lothian.



## contents

**Foreword by Graeme Morrice, Leader of the Council  
and Alex Linkston, Chief Executive**

<b>1</b>	The path to excellence – the future of customer services in West Lothian	<b>P1</b>
<b>2</b>	Strategy aims and objectives	<b>P2-3</b>
<b>3</b>	Listening to our customers	<b>P4-5</b>
<b>4</b>	Improving access to services for all	<b>P6-7</b>
<b>5</b>	Transforming service provision	<b>P8-10</b>
<b>6</b>	Use of technology	<b>P11</b>
<b>7</b>	Cultural and business change	<b>P12-14</b>
<b>8</b>	Performance management and communications	<b>P15</b>
<b>9</b>	Assessment of priorities	<b>P16-17</b>
<b>10</b>	Case study – Smart information	<b>P18</b>
<b>11</b>	Next steps	<b>P19-20</b>
<b>12</b>	Glossary of terms	<b>P20</b>
		<b>P21</b>

# foreword

We are pleased to introduce this Customer Services Strategy for West Lothian Council. This council has always been committed to excellent customer service, this is underlined by our aim of achieving a Charter Mark, the government's award for excellent customer service, for the whole council in 2007. Our success was further recognised by being crowned UK Council of the Year 2006 - we are the only council in Scotland ever to have won, or been nominated for, the title.

However we are not complacent, the Customer Services Strategy is an important document which outlines our vision for customer services over the next three years 2006 to 2009. It is important because it pulls together a number of existing strategies at a national Customer First level, and our own local policies, providing a framework for taking forward customer focused services.

The Best Value Audit which was undertaken in 2004 placed us firmly at the forefront of excellence in delivering public services - a position which has been achieved through a lot of hard work, willingness, determination and a focus on improving the way we deliver services in West Lothian.

It is important that we continue to deliver the highest level of customer service across the council. We have a strong foundation to build on, but we also need to continue to find new, improved ways of doing business, which move our modernising agenda forward. Our involvement in the Customer First National Strategy Group is a continuing reminder of the future direction of public services. The heart of this agenda is bringing services closer to local people, making them easier to use and

ensuring that they offer best value. Putting customers first sounds obvious - however it will entail changes to some of the ways we have traditionally offered services.

New ways of working, acquiring new skills and managing demand and expectation from customers requires commitment from everyone in West Lothian Council - management, councillors and staff alike. We think that it is a challenge that we're well placed to meet.

We look forward with confidence to the future and to delivering further quality customer services in West Lothian.



**Graeme Morrice**  
Leader of the Council



**Alex Linkston**  
Chief Executive



# the path to excellence – the future of customer services in West Lothian

## Our customer services vision

West Lothian's vision for customer service over the next three years is to provide better access to improved public services in West Lothian. We already have a number of forward thinking and innovative strategies and projects which demonstrate this and reflect our overall commitment to our mission statement:

*"Striving for excellence, working with and for our communities"*



In 2002, these guiding principles were developed to help us focus on the delivery and development of services. They are still as relevant today as they were then.

- A corporate council** - focused on priorities
- A connected council** - at the heart of a network of partners
- A customer focused council** - organised around the needs of our citizens
- An adaptive council** - operating in a responsive positive culture
- A best value council** - delivering high quality integrated services
- An e-council** - enabled by technology

### Achieving the vision is centred on these principles which will:

Require us to make choices. We know we can't do everything but will need to focus on the things that we can do well and make them even better, making best use of our resources to improve the quality of life of the people of West Lothian. We need to set clear priorities and invest in public services in ways that will achieve modernisation and reform. We increasingly need to provide joined up services - integrating not just the services that the council offer but also, where we can add value, making links to services provided by our other public sector partners. We need to put customers at the heart of everything we do and organise our services around them. We will have to adapt to changing circumstances and expectations and be empowered and motivated to change our ways of working. We need to operate in a culture of continuous improvement, and use relevant information technology to enable more joined - up, effective and efficient solutions to be developed to improve customer services.

## the vision ...

By 2008, West Lothian Council will have a pattern of service delivery which is even more flexible and ably meets peoples' needs. Levels of customer satisfaction will be higher – as will our ability to handle complex customer enquiries at the first point of contact. Well-trained and motivated employees throughout the council will take ownership of customers' problems and act proactively, anticipating customers' needs across a range of services. Consistency of service will be assured using a variety of information communication technology (ITC) solutions – making it possible to handle and respond to enquiries through a range of channels and locations. Business processes will be re-designed and streamlined – reducing transaction times and improving efficiency.

## About this strategy

This strategy is not a new concept – but what it does is try to make sense of a range of policies, strategies and action plans that are already in place to provide an overall framework for taking forward customer services in West Lothian. The different elements outlined in this document are inter-linked – improvements in customer services will require a range of complementary activity across various policy and action plans.

## The strategy in context

### The national agenda

Modernising our services has been at the heart of our business over the last 10 years and has increasingly been driven by both central government and the Scottish Executive. Change within the public sector is being influenced by the Executive's Customer First programme, which recognises that customers have service needs which straddle both public service boundaries and local and central government functions. Public service reform and efficient government initiatives also reflect economic pressures and political realities which are limiting public expenditure – resulting in local authorities having to invest public resources in ways that will achieve modernisation and reform – and which maximise front line customer services.

### Customer first

**The 'Customer First' programme provides a national framework to support all Scottish councils in their plans to deliver consistent and measurable improvements in local customer services – with a core objective of delivering public services at first contact.**

**The expectation is that all authorities will work towards an agreed single model of electronic service delivery. Customer First also focuses on secure data sharing across the public sector within the framework of the Local Government Act (2003). The overall aim is to provide a common template for the local and national implementation of the citizens' account, national addressing, authentication and electronic service delivery and setting out the standards that are necessary to ensure that information can be shared.**

### Local priorities

#### Inclusive and accessible services

A number of social, economic and geographic factors influence our vision. West Lothian is a diverse area – both geographically and in terms of life circumstances. The strategy attempts to address the issues of accessibility of services by those living outwith the main settlements and whose life circumstances may limit their ability to access services and information. This isn't just about tackling the issue of increasing access to the internet, but harnessing the power of e-government to tackle exclusion from services and communities.

#### Partnership working

Increasingly, services are being delivered in partnership with our public sector partners. Locality planning aims to plan and develop services at a more local, neighbourhood level; working more closely with local people to ensure that services are co-ordinated and complementary. The new Civic Centre will also provide a focus for integrated services involving a new Divisional Police headquarters, Lothian and Borders Fire and Rescue Service, Sheriff and District Courts, the Procurator Fiscal's office and the council. We will grasp the opportunity these initiatives give us to change the ways in which we work.

#### Meeting customer expectations

Expectations are changing. Customers increasingly expect public services to be delivered in ways which suit them. The development of this strategy has been informed by public consultation – through the council's own citizens' panel, exit surveys from services and focus groups, which have been undertaken to identify the kinds of services and information that customers would like to be able to access.

#### Existing strategies

The Customer Services Strategy builds on our commitment to continually improve the services we deliver. There are a number of corporate strategies underpinning this, including the West Lothian Assessment Model (WLAM), which provides the framework to bring about an improvement programme for the whole council. **The West Lothian Assessment Model** allows us to benchmark ourselves against the best in Europe, both public and private sector. **The People Strategy** sets out what the council will do over the next three years to deliver a culture in which people feel motivated and empowered to deliver constantly improving services – ultimately enhancing the whole customer experience.

#### Integral to improving services

These strategies will help to deliver improved customer services and are an integral part of the way we will support the changes and ultimately improve customer service. More detail on **the People Strategy** is contained in section seven. The implementation of the WLAM has allowed services to establish much more effective performance management systems and the model will continue to be a fundamental plank in the overall Customer Services Strategy.

# Strategy aims and objectives

The strategy aims to deliver the vision of **'Better Access to Improved Public Services in West Lothian'**. The Customer Services Strategy will be used to guide the work of services over the next three years and will contribute overall to the aims and targets outlined in the council's corporate plan and West Lothian's Community Plan **'Shaping the Future'**.

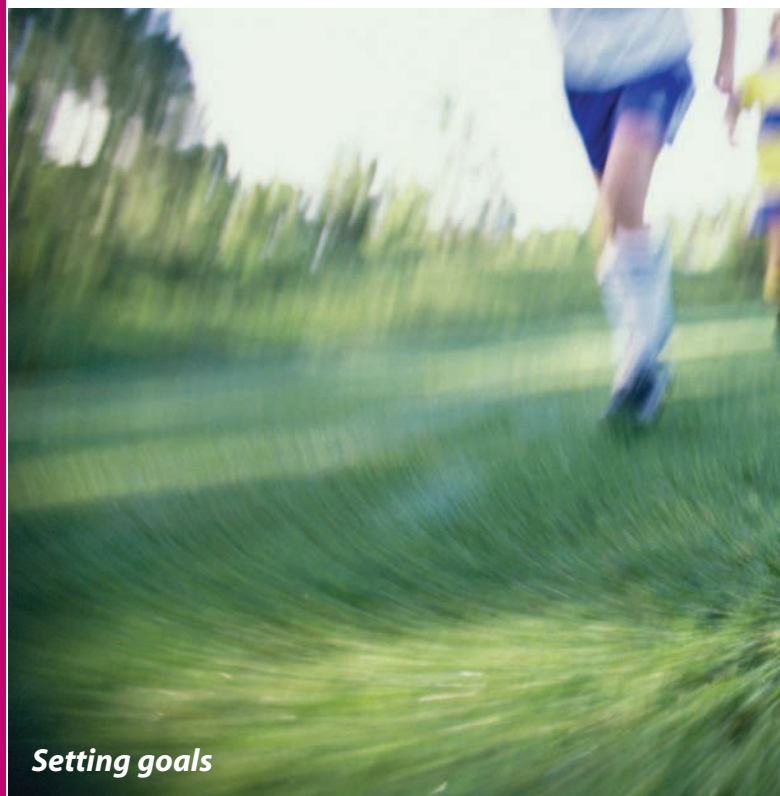
## The six key objectives for the customer services strategy are:

1. To put customers at the heart of our service provision, and to listen and respond to them when planning changes.
2. To work towards improving access to public services in West Lothian for all our customers – whatever their ability, age, preferences or where they live.
3. To transform service delivery where change is needed, to deliver services that are more responsive to customer requirements and to give better value.
4. To make and keep commitments to customers when we provide services – and inform them about the progress of the service they have requested.
5. To continue to develop the culture of customer service throughout the council and to help staff improve customer service skills.
6. To ensure all services operate at the Charter Mark standard for customer service.

As a result of implementing this strategy, customers will have a choice of ways to access services, such as the telephone, Internet, face-to-face and receive a consistent service no matter how they approach the council.

## This will allow customers to:

- Receive excellent service from all their contacts with the council – whichever access method they choose.
- Have a choice of ways to access services. For example having complex enquiries dealt with in full and in one place – sometimes involving more than one service or agency.
- Not have to work out which section or person they need to deal with - resulting in less confusion over who is responsible.
- Experience satisfactory outcomes without the need to make repeat calls or chase a response and be kept informed of progress about their request.
- Be clearer about what the council can and can't do for them.
- Have more confidence that we understand our customers' needs and will deliver what we promise – and know that the adviser they are talking to will take personal responsibility for solving their problem or enquiry.



*Setting goals*

## How will we know that customers are receiving a better service?

It will be important to measure and monitor customer services, to allow some year on year comparison of how well we are doing. Some of the measures that will be put in place include:

- Satisfaction surveys.
- Monitoring against performance targets.
- Time taken to deal with enquiries.
- Analysing trends in access channels.
- Number of core services dealt with at the first point of contact\*.

\*One of the areas that we need to clarify is knowing exactly what our core services are and working towards dealing with at least 75 per cent of these requests at the first point of contact (national Customer First target).



## For the council this means committing to:

- Putting customers first – at the centre of everything we do.
- Understanding customers' needs and responding proactively to them.
- Setting service standards and meeting them.
- Knowing how well customers consider we are performing.
- Training staff to enable them to deal with any customer enquiry.
- Supporting and developing staff to have the flexibility to sort out complex problems and provide them with the tools they need to help them do their job.

## For services this means committing to:

- Examining key business processes to reduce bureaucracy and make them more efficient.
- Providing services and transactions through main customer access points such as the Customer Service Centre and the Internet, and have confidence in the services these provide.
- Ensuring that services are delivered in line with service commitments.
- Ensuring all staff have an awareness and understanding of the council's Customer Services Strategy.
- Keeping customers informed - especially when things go wrong.
- Ensuring that customer care standards and performance targets are met.
- Taking responsibility for and managing the whole process – from first contact to satisfactory conclusion whoever actually contributes to the service provision.

## A new approach

This is a council-wide strategy which will affect all parts of the council. Putting the strategy into practice requires us to work as a single organisation – working on a matrix arrangement to provide unified services. Adopting a front office / back office form of working may be different from the current ways of working for some services. This means simplifying our processes, making them accessible through the council's web site, in council establishments and through personal computer access in peoples' homes.

Putting our customers first is key to the Customer Services Strategy. It is not envisaged that 100 per cent of services will be available through every contact point, but the widest range of services possible will be available. This will enable them to be used as a local community resource, adding to the information available for 'locality planning' and councillor ward surgeries.

Managers will remain responsible for developing and monitoring service delivery channels – although the information or service process may well be implemented in a variety of ways, through self-service, call the Customer Service Centre or CIS. Service managers will still be responsible for monitoring and ensuring that service standards are being met and also for keeping information on the web up to date using content management software.

# Listening to our customers

**It is crucial for us to listen to our customers** if we are going to develop and deliver responsive public services which meet their needs and expectations. Equally important is to hear what customers are saying and using the information through consultations to change the way we plan and develop services, policies and procedures. We already consult with customers in many different ways and some very creative and innovative methods are currently being used within services. We will ensure that the outcomes of all the consultations we undertake are shared and passed on to staff at all levels.

## Consulting with local people is important because it:

- Helps to shape service development and provide more sustainable services.
- Helps to increase communication between local people and the council.
- Is central to achieving more socially inclusive services.
- Provides a way of finding out what local people think about the services provided by the council.

To avoid consulting too often it is important that we adopt a consistent approach to consultation.

We already have a number of elements of a consultation framework in place and a **Community Engagement Strategy** which was endorsed by the community planning partnership. These will be enhanced and developed to produce a more comprehensive consultation framework which will include:

- A range of methods and techniques to help us engage with customers.
- A set of good practice guidelines on how to get the best out of consultation exercises.
- Standards of community engagement.
- How we best capture, share and disseminate corporate findings.
- Evaluating and providing feedback to customers.

The framework will be informed by undertaking an audit of consultation to establish how and where the council and its partners are consulting. This will identify ways in which duplication can be reduced, gaps can be filled and which consultative exercises can be undertaken collectively.

An access survey will be conducted using the Citizens' Panel to look at current levels of service accessibility and satisfaction – providing a baseline of information on which to move forward.



*Listening and learning*

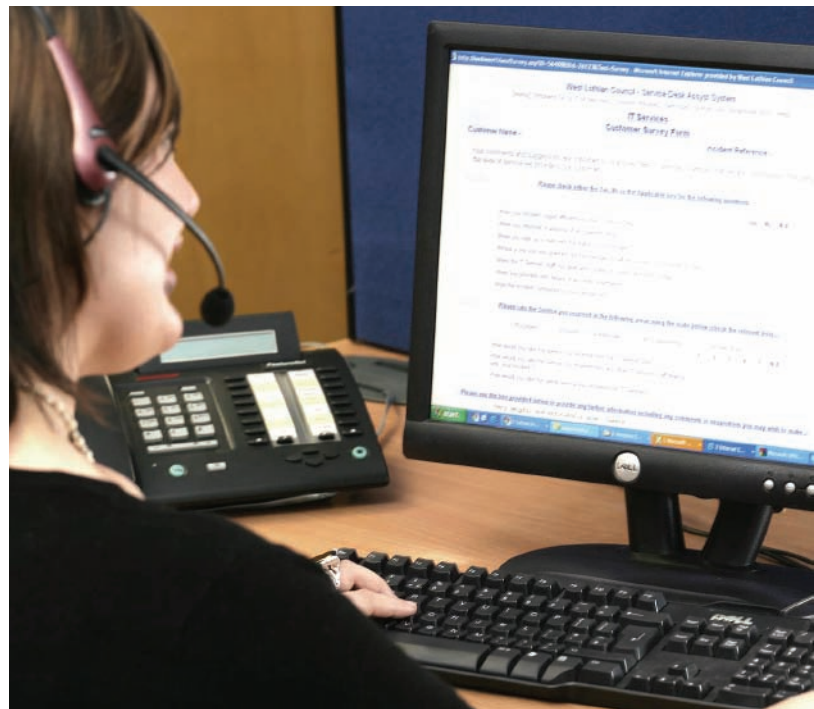
## We will continue to seek customer views through:

- Corporate complaints, views and comments system.
- Regular corporate public surveys.
- Services continuing to undertake service-specific surveys.
- Using techniques like 'mystery shoppers'.
- Ongoing feedback will be captured through our Customer Relationship Management (CRM) system.

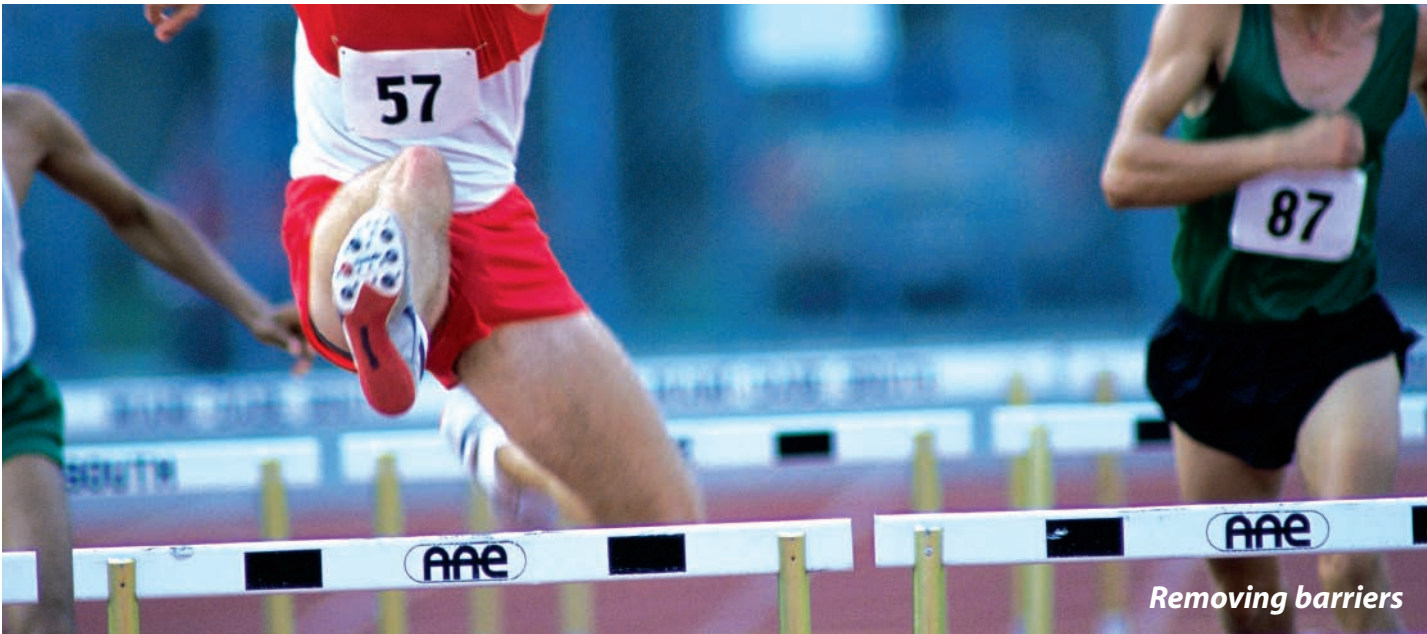
Consultation is not just limited to customers. We will consult with all stakeholders involved in service provision – internal customers, partner organisations as well as councillors and staff. We will also develop links with external agencies which have expertise in this field. The Scottish Consumer Council, for example, has experience of a number of consultative approaches designed to help organisations test customer satisfaction. One of these is the use of mystery shoppers – customers who have been recruited specifically to comment on the level of service they have received and how satisfactory it has been.

## As a result we will:

- Develop a shared understanding of what our customers want and what matters to them.
- Connect to customers as a single organisation rather than as a collection of different services.
- Join with other partner agencies to integrate and provide seamless services.
- Maintain contact so that we hear and respond to the voice of our service users.
- Measure and evaluate the overall effectiveness of our service to customers.



# Improving access to services for all



*Removing barriers*

## New standards for access to services

Customers' impressions of the levels of service they receive start to be shaped from the first moment they contact the council. Each customer is an individual with individual requirements, skills and expectations. Our challenge is to ensure that first contact gives fast, efficient access to services however the customer chooses to approach the council - and to make sure that information and the level of service provided is always consistent. Many of the initial customer contacts will be with a member of staff and the way in which they respond is critical to the customer's first impression of the service. Communication guidelines for West Lothian Council have been published as the West Lothian Way and set the standards to be followed.

## Services will be:

### ■ Easier to access

Customers should not be expected to know how we organise ourselves within the council, the inner workings of other service providers in West Lothian or national bodies to be able to access the services they need. Customers aren't really concerned about which service or department deals with what - they just want access to the service they require.

### ■ More joined-up

As service providers we are responsible for joining services together on behalf of customers, to make it easier for them. This will mean services working together to understand how their processes are linked and the outcomes they provide for customers.

Sometimes combinations of services are needed at key times of change in someone's life, such as when they have a baby or suffer bereavement. Managing and sharing information across the council and with our public partners will help us to make our services more accessible.

### ■ More accessible

All customers need to be able to access services in their chosen way. As we move into new ways of providing services, we have to ensure that we remove barriers and not create new ones - particularly for disabled and minority groups with special needs.

### ■ Adapted to meet individual needs

A key requirement for improving access to services is to personalise service delivery to reflect each customer's individual needs. This includes giving people appropriate secure access to information we hold on their interactions with the council, and offering them the opportunity to be sent information proactively about their particular interests through a channel which suits them. Encouraging local organisations to use the community website to publicise their activities will extend the range of local information and enhance the functionality and use of the web.

## And ...

At least 75 per cent of requests for core services will be dealt with at first point of contact. This is a national target set through the Customer First strategy. We will define clearly our understanding of core services and put in place a prioritisation system to enable these services to be fully accessible.

## Choices

We will provide services in ways which suit customers best – by telephone, the Internet or in person, and where appropriate through external intermediaries. However customers contact us, they will receive the same information and a comparable high standard of customer service.

We recognise customers will wish to use a variety of contact methods, perhaps starting off a transaction on the web and then finding it more convenient to talk to someone over the phone to ask for updates on progress. Customers do not expect to explain their problem from scratch every time they make contact. We will work towards a joined up approach by which information is available in real time through all the access channels.

**The access channels are:**

### Self-service

One of our biggest challenges is to provide a service in a way that can be easily accessed over the Internet (or the Intranet for internal customers) and can offer a convenient 24 hour, seven day a week service to our customers. Successful delivery through this medium means that the services provided are:

- Quick to access.
- Easy to find on the website. Intuitive to use – for information or to book and pay for services as needed.
- Personalised to meet customers' circumstances and needs.
- Fully transactional, providing current information from internal systems.
- Accessible through home computers.
- Available to people with disabilities.

### We will work to deliver all of these

Use of the internet should give customers direct access to their own service transactions. Service providers will own the information on the web and keep it up to date using content management software.

Self-service can never completely take the place of talking to a real person when dealing with complex issues. An expert speaking to the customer would ask a series of questions, each influenced by the answers the customer gives to the previous question. This will be reproduced, at least in part, using electronic forms. If an expert is required to complete the enquiry, they will continue from the customer information that has already been collected.

Self-service channels, reusing the web data, could also include kiosks and digital television. Where the access

is through the internet, access will continue to be made available through libraries, community centres and other public places. Staff coming into contact with customers as they deliver a service, perhaps in a sports centre or school, will also access web based information on behalf of customers when needed.

Self-service is by far the most cost-effective way of delivering services. When more transactional services are made available online, the services available will be properly marketed to encourage greater take up by those who are happy to use this channel.

**The information on the council's Internet site will be enhanced by:**

- Grouping topics and making links between content areas.
- Improving the reliability, speed and security of the website.
- Ensuring information is accessible and understandable for all customers.

**Not all households have personal computers and this digital divide will be addressed through:**

- Internet access within council facilities such as community centres and libraries.
- Kiosks providing a range of information and services in our more remote communities.

### Telephone

Telephone is currently the most popular way for customers to contact the council, and this is likely to remain the preferred way for sometime. The call centre concept has been a functional part of the council since 2000 and has expanded to manage 200,000 calls in 2004/05. The Customer Service Centre widens the call centre concept to include fax, e-mail, instant messaging, text messaging, video conferencing and textphone. Customer Advisers in the Customer Service Centre will act as intermediaries and advocates for customers. Specialist Customer Resolvers will manage complex service failure issues before they become apparent to the customer, acting as agents of the customer within the organisation.

The Customer Service Centre will provide a 24 hour, seven day a week service, both for emergency and other services. Service provision will reflect the needs of customers. It will be based around customer life events rather than around council boundaries. Success will be measured by the end-to-end process being completed successfully - rather than individual services completing their 'bits' successfully.

### To meet its full potential, the Customer Service Centre will be enabled to:

- Take payment for services, as well as for the payment of accounts and to manage its resources to meet the standards provided by private sector competition.
- View transactions customers have entered into on the web or other access channels.
- View the complete records of customer transactions, including correspondence with services and customer files held electronically by services.
- Track the progress of customer transactions from the initial contact through to their conclusion.
- Be flexible in finding solutions for customers. Customers have different needs and advisers need to be able to respond to these and to work with the customer through to resolution of their issue.
- Help customers with special requirements such as those requiring textphone (minicom) or translation services. Freephones and video conferencing will be deployed when this improves communication and especially to reduce social exclusion.
- Use SMS text messaging if appropriate.

## In person

### Multi-functional facilities in communities

We have been particularly successful in providing customer services using a one-stop co-ordinated approach – within West Lothian Connected, Strathbrock Partnership Centre and the Ability Centre. The Council Information Services (CIS) centres have been largely successful but can be improved by building on this approach.

Effective face-to-face service delivery will require advisers to be able to access the information they need to help customers in locations which suit them. To provide easily accessible opportunities for personal contacts with customers, we will continue to support a network of customer service centres providing a comprehensive range of public services as close as possible to where people live.

There are a number of public buildings and facilities, and we need to ensure that we manage the council's property assets in the most effective ways – maximising joined up services to greater effect.

One of the areas where this will be particularly effective is integrating CIS centres in libraries – co-locating services within a busy public resource in well used community buildings.

### We will:

- Work in partnership with other public service providers to provide an extended range of services.
- Have multi-skilled staff trained to handle any type of enquiry or transaction – able to resolve 70 per cent of customer contacts.
- Provide access to services and information electronically for customers via the Internet.
- Use video conferencing to provide an effective means for Benefits staff to conduct 'virtual interviews' with customers.

The collection of cash will be withdrawn from these centres and directed via local Post Offices.

## Through intermediaries

It is not always possible to provide convenient access to services, especially face to face services in our smaller, rural communities. An alternative is to enable services to be provided by people already active within these communities.

### Examples of service provision through intermediaries could include:

- Post Offices collecting cash payments, perhaps helping to maintain the viability of that outlet in local communities.
- Support for elderly people through day centre staff.
- Support for councillors to provide information / services at their surgeries.
- A-Z of Services and Scripted Text\*.

\*Scripted text is a tool which was developed initially for the Customer Service Centre. Information about the service and frequently asked questions allows advisers to respond directly to customers. The 'script' is owned, written and updated by the services themselves – to ensure accuracy.

Whether customers access services on a self-help basis or through an adviser, there needs to be an easy way to find answers to the questions customers ask. The current A-Z of services is a support service which allows information to be easily accessed. A similar form of this is used in the Customer Service Centre and on the web. Trials are now taking place on a standard A-Z structure which will eventually cover all local authorities in Scotland.

We will develop more complex scripted text or answers, using electronic forms to reproduce the lines of questioning a specialist professional adviser would follow. The text will follow different patterns depending on the answers the customer gives to questions.

# Transforming service provision

**The national Customer First strategy** sets out the framework for the future of public services and identifies some of the key areas to be tackled in transforming services, and West Lothian's approach will incorporate these. We are at the forefront of transformation of service delivery in local government and we need to continue to develop our services from our customer's perspective.

## Designing services round customers

We can only provide customers with excellent access to services if the services themselves deliver what they need. One of our key challenges will be to ensure that the information about our service processes is easily understood and accessible from a customer perspective. We will need an in-depth understanding of the overall outcomes we are providing for customers and will then need to re-design our processes to deliver the required outcomes. Throughout, the customer will expect to be able to track progress and to be kept fully informed about any changes to the delivery they have been promised.

Working in this way will be more sustainable – allowing us to become more efficient and to create the outcomes people want at costs we can afford.

Transforming services in this way will provide challenges for service managers in prioritising change around those areas which offer the most customer interfaces. The impact on staff could be significant and will require strong leadership and change management skills to support this. Two Business Improvement Leads (BILs) have been appointed to initiate and support the transformation process. They will work alongside the staff already supporting the improvement and change process within the council.

Success of business transformation will be measured in terms of increased customer satisfaction, measurably increased efficiency and it should also result in a decrease in customer contacts as complaints are reduced and services are delivered more pro-actively.

## Priorities

The priorities for transformational change are based around those services for which there are the highest numbers of customer contacts. These are:

- Revenues
- Operational Services
- Housing Services
- Support Services for (internal customers)

*Stretching targets*



# Use of technology

We will develop and use appropriate Information Communication Technologies to help deliver the strategy. These tools will enable us to gather, manage, share and integrate information about customers. The technology will not determine how services are delivered but will help enable some customer requirements to be provided for the first time. There are many examples where this has already been introduced in parts of the council as part of the Modernising Government programme and by services themselves.

## Ways of providing secure access to electronic services

As a pre-requisite for providing personalised services we need to be able to authenticate the identity of the customer and to make the link to their unique Citizen Account which includes their address. The address information opens up new opportunities for giving people information based on where they live. Linked to other information we have in databases, we should be able to tell people how far it is from their house to the nearest facilities they need, or perhaps tell them about work which will be taking place near where they live. As we move to Locality Planning, this opens up exciting possibilities for reporting on what is happening in the local areas.

Customer First is establishing national guidelines for authentication and registration for the Citizens' Account. We are one of 10 councils which will be involved in early implementation of this in the winter of 2006.

## Citizens' Account

The Citizens' Account is an electronic Scottish Public Sector Customer Record, and is being organised nationally through the Customer First programme. It provides:

- A secure electronic registration process which will allow customers to set up their own personal electronic record with public services. This will remove the need for customers to constantly repeat the same basic information when they request services, and give them improved access to information held about them.

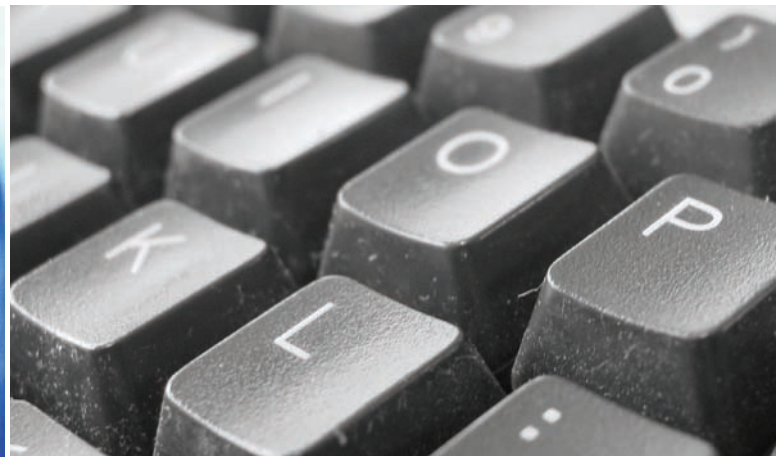
- A secure authentication and messaging process using the Government Gateway, which will allow customers to transact securely online with the council and with government agencies.
- A link to the address of where the customer lives. The Citizens' Account will be developed in a standardised format throughout Scotland. When changes need to be made to it, such as when a customer moves house, these will be made through a national hub, so this change can be shared with anyone who needs to know.

## Master address database

Also known as the Corporate Address Gazetteer, this is a list of addresses for all the properties in West Lothian, in a standard format. It has also been developed as part of the national Customer First programme, and includes the Unique Property Reference Number, which is part of the Citizens' Account. It also includes geographical co-ordinates which allow people with Citizens' Accounts and property information to be displayed in map form using Geographical Information Systems (GIS).

## Data sharing

The Master Address Database (MAD) allows links to be made between address data in a range of data sets to give a comprehensive view of a property. Personal data is linked in a similar way through the Citizen's Account (CA) and both the MAD and the CA will link to the national hub and through that to national data sets.



## Open standards

We will ensure that we adhere to the software standards described on the Open Scotland Information Age Framework (OSIAF). These are mandatory for software purchased with Scottish Executive funding, such as for the Modernising Government fund and now Customer First. Use of these standards makes it much easier and less expensive to share data between software solutions.

Given that other local authorities should also be operating to these standards, our adherence to them allows us opportunities to share IT solutions developed elsewhere. We will write clauses into new IT contracts, this will enable work commissioned by us to be shared with other Local Authorities. We expect this benefit to be reciprocated.

## Smartcards

Smartcards are one way for people to carry an easily portable form of identification linked into their Citizen's Account. Smartcards have only been used for cashless catering in schools so far and for "Proof of Age" for secondary school pupils. Cards have also been issued for concessionary travel for older and disabled people as part of the national scheme in April 2006.

For real benefits to be realised, Smartcards need to give access to a wide range of council and other services, replacing many if not all of the separate cards now available such as those used as library cards or sports centre membership. They could be particularly useful for anyone with benefits or entitled to concessionary rates, but they could also give access to self-service channels of service delivery when combined with appropriate passwords or Personal Identification Number (PIN).

We will develop the use of smartcards, balancing the rate of progress with the business case for their use.

## Customer Relationship Management (CRM)

A CRM system brings together information about the transactions we have with our customers. To be effective, it has to be available at least to some extent for customers accessing services through all channels and work in real time. This will allow a transaction started on the web to be continued over the phone to the Customer Service Centre, or a conversation with a customer to be transferred to a specialist adviser without the customer needing to repeat their story.

Our current CRM system is the Enquiry Tracking System (ETS), which will be developed around a workflow system to allow service commitments to be tracked effectively. This may be an interim solution; a replacement CRM solution will also be considered. One benefit of a CRM system is that it allows sophisticated customer segmentation, enabling specific services to be targeted at groups for whom they are likely to be particularly suitable.

Recording a customer contact on the enquiry tracking system is only the start of the relationship with the customer we have with regards to that transaction. Customers expect to be told when they can expect the service to be delivered, to be able to change appointments and to be kept informed when we have to change the plans we have made with them. To allow this, we will link the CRM software into the delivery of the service, so that updates are fed back as needed.

## Online Payments

This will allow customers to pay for services in ways which suit them – through all of the channels mentioned earlier. A more efficient automated system will make processing of payments more cost effective and having one system for collecting and distributing revenue results will lead to better tracking of customer transactions and providing 'real time' information such as customer balances.

## Document management system (DMS)

A DMS manages the documentation received which is scanned, indexed and stored electronically. The system includes a workflow element so that transactions and relevant documents are directed to the appropriate service and member of staff. We will integrate our DMS system with other systems (particularly the Customer Relationship Management System). This will allow the enquiry to be dealt with speedily and consistently.

## Content management

Content management covers the creation, management, distribution and publishing of information across the delivery channels. The information needs to be streamlined, up-to-date, maintained and easy to use. We will design the website to maintain it as fit for purpose in this new environment.

## Corporate knowledge management

The council is a diverse organisation which holds a vast range of information and knowledge. We will join up the information that we hold across all the services to create a corporate body of knowledge which encompasses and integrates all the current sources of knowledge and information. This needs to be understandable, accessible and meaningful to customers – and above all, it needs to be organised in a way which is easy to use. The aim is to create a knowledge engine, which joins up information. This will be supported by a corporate knowledge management framework which will set out the policies and procedures for accessing and maintaining data and information.

This will allow information to be input once, stored securely and accessible to all.



*Pulling together*

# Cultural and business change

The changes facing the council over the next few years in developing customer services will bring major challenges as well as new opportunities in the way we deliver customer services. **People are our most important asset.** Our potential as a council to deliver the best possible services for the communities of West Lothian can only be realised when we maximise the potential of our employees. People make the difference in customer service.

Everyone in the council has customers – and everyone in the council is responsible for providing good customer service, not just frontline staff.

To support these changes, the People Strategy will focus on the way we recruit, develop, manage and recognise employees. This will help develop a culture in which people feel motivated and empowered to deliver constantly improving services and to transform the customer experience.

## The strategy will help us to:

- Win the race for talent by attracting and retaining a capable and talented workforce through innovative strategies.
- Get fit for management and leadership through raising the standard of management and leadership by helping managers identify and develop the behaviours, skills and knowledge needed in their current and future roles
- Enable people to deliver excellent services by focusing on the behaviour, skills and knowledge needed to achieve individual potential and the context in which they operate.

Customer focus will be a central component of the People Strategy.

Ensuring staff are well motivated and equipped with the right knowledge and skills is an integral part of the council's Customer Services Strategy and to support this we will:

- Develop a corporate charter for customer services setting out the standards that customers can expect.

- Produce a Customer Services Handbook – a toolkit which will be a practical guide for engaging with customers.
- Deliver a comprehensive customer service training and development programme for all staff as part of the **People Strategy.**
- Continue to develop the culture of customer service within the council by allowing staff to take ownership of issues and enabling them to find solutions.

To demonstrate that we have reached the highest quality corporate standard of customer service we will work towards achieving an all council Charter Mark status by 2007.

## The people element of change

**Staff may feel anxious about the transformation of the services they delivered in the past. For some, this will mean opening up new opportunities in other service areas. Others may need to learn new skills to continue to deliver what they were producing, but to do this in new ways.**

**We will:**

- **Ensure that staff are kept informed and they are supported throughout the change process.**
- **Develop a workforce plan identifying the current and future skills employees will need to deliver new and improved services and the number of people required.**
- **Develop staff competencies to meet the changing environment.**
- **Further develop the professional career paths available for Customer Services staff who have a specialist role in delivering frontline services.**

# Performance management and communications

West Lothian Council's performance management system is built around the **West Lothian Assessment Model**, which uses the European Foundation for Quality Management (EFQM) framework. This helps services establish much more effective performance management systems and to capture information on how well we are performing. Future developments will include more widespread public performance reporting and benchmarking of services. Publication of a wide range of performance details on the internet will be introduced which will ensure that council services are much more transparent – and will be provided in a way which is understandable, accessible and relevant.

The way we plan and develop services is critical to improving customer services if the desired service levels and performance outcomes are to be met. This will require us to be more effective and efficient in the way we continue to develop and improve services but in a way which provides better value for money. This will undoubtedly be challenging and will require the council and services to:

- Manage and prioritise resources more efficiently.
- Ensure that effective performance management systems are in place.
- Control costs and provide financial benefits.

We will develop an assessment framework which will enable us to measure the impact of these three key efficiencies. Some of the key components of this framework will be:

- Identification of priorities, synergies and efficiency opportunities.
- Effective project and programme management.
- Costs and benefits management.
- Risk and change management.
- Quality management.

## Performance Indicators

National performance indicators are under development as part of the Customer First programme. We will use these indicators so that we benchmark our results against other councils.

The key measures we will be looking for are (subject to national standards):

- Percentage of customers expressing their satisfaction with the service (with breakdown by key service areas and by access channels).
- Efficiencies delivered as a result of transformation projects (value of inputs required to deliver comparable outputs). This is sub-divided into actual cost reductions and staff time which has been saved.
- Staff satisfaction - applying both to satisfaction with any development activity they experience as part of the Customer Service training and development programme and the satisfaction level of frontline staff with the service they are able to provide for customers.
- Percentage of core service requests dealt with at first point of contact.



These are the key indicators, but some such as customer satisfaction levels are difficult to measure on a month-by-month basis. Satisfaction will also be measured by measures including:

- Percentage take up of self-service channels for individual service types.
- Cost reduction due to changes in customers' choice of ways in which they access services. (Movement to self-service, or from contacts made in person to phone.)
- Reduction in complaints due to improved satisfaction levels and more proactive service delivery.

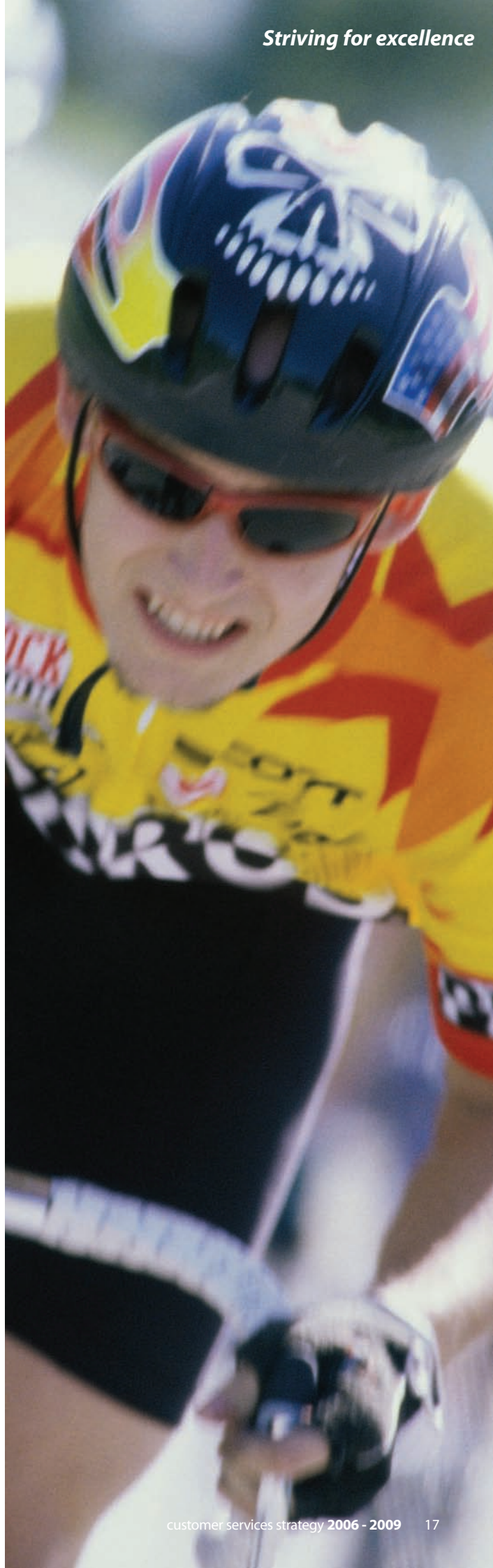
A performance management framework will be agreed to enable us to benchmark services with other local authorities. We will use the best practice standard of the Call Centre Association framework.

## Communication plan

The communication plan will follow the guidelines in the council's communication guidelines 'The West Lothian Way'.

The way the public perceives the council and the services it provides is important. Building on the marketing strategy we will market and promote the services we provide and the way we provide them.

Good communications is vital to the council. Whether we are communicating with our customers and partners, or each other, we should strive to deliver high standards and be consistent in our approach. Effective communication is also an aid to good decision making and essential when it comes to putting our plans into action.



# Assessment of priorities

This strategy is our response to the national Customer First agenda. There are a number of elements of this strategy to be undertaken to achieve our vision. These will need to be delivered as part of a phased programme.

Delivering the strategy will require us to base our actions on customers' requirements. Resources needed to complete the plans to transform service delivery will need to be prioritised. For some parts of the strategy, such as the plans to transform service provision, we will only know what resources we will need to complete the transformation as the projects progress.

The external Customer First funding we have received is conditional on it being used for projects which link to the national infrastructure. This infrastructure is compatible with our understanding of our customers' needs for service provision cutting across all levels of government provision and not restrained by geographical boundaries.

## The projects to deliver the strategy will be:

- **Prioritised to meet our Customer First commitments and thereafter according to the customer views and demand, so that resources are used where they can make the most impact for customers.**
- **Preferred if they deliver services more efficiently. Preference will be given to projects which can show increased efficiency savings over others with similar customer impact.**
- **Managed using effective programme and project management techniques, to ensure that progress is made and interdependencies are managed.**
- **Judged on their business case including baseline and forecast customer and cost measures.**
- **Recorded on the Initiatives System so that everybody can see progress.**



*Ace service*

# Case study – Smart Information

This case study illustrates the benefits of being able to provide a service to customers at their first point of contact. This information could have been accessed directly from a home internet connection, or by telephone to the Customer Service Centre, or through visiting a council office. The second part of the case study looks at what we need to have in place to ensure that this can happen.

Mr Bruce lives in Broxburn in a local authority house. He has a few concerns about his home and the immediate environment. Some of the neighbouring villages have been getting their bathrooms and kitchens refurbished and he is keen to ensure that his bathroom is upgraded – particularly as he has limited mobility and a walk in shower would be much more useful for him. Also he is not very happy as someone has ‘dumped’ an old sofa next to the landscaped area across from his house. There have been a few accidents on the main road adjacent to his house and he wants to know what’s going to be done about this.



Mr Bruce and his daughter, Liz Bruce, decided to visit his local councillor’s surgery. Councillor Brown has a laptop connected to the Internet. She asks Mr Bruce if he has his community smartcard, which he produces and inserts into a reader and he enters his security code.

She goes into the community website westlothianonline, and finds the section on housing. She is able to inform Mr Bruce that his bathroom is due to be refurbished later that year, and that housing officers will be in touch prior to that date. She is also able to tell him that the current projects are running to schedule and what the total cost of the refurbishment programme for Broxburn will be.

Now the councillor can address the concern about the abandoned sofa. The councillor is able to arrange, via the web, for the sofa to be uplifted.

Concerning the number of accidents on the Main Street. The councillor is able to identify what the current performance is in relation to reducing accidents in West Lothian, and that it is a community planning target for the whole area. She is able to tell Mr Bruce that across the whole of West Lothian accidents have been reduced and that the position in Broxburn is better too – but not in comparison with some other areas. She is also able to tell Mr Bruce that there have been some studies conducted around the volume and speed of vehicles through the town – resulting in some additional traffic calming measures being proposed. This is currently being discussed with some of the towns groups and organisations – including the Community Council. Councillor Brown is conducting her own research into this and asks Mr Bruce if he wishes to ‘vote’ on this. This is done via his smartcard.

Liz Bruce raises some concerns about her father’s ability to cope since his wife’s death a few months ago. He has difficulty getting around the house and has fallen a few times. Councillor Brown asks Mr Bruce various questions about his mobility (prompted by the website) and is able to establish that a more detailed assessment is required from a social care professional. An appointment is made via the web. Mr Bruce is now eligible for a rent and council tax rebate – which is also done online.

Mr Bruce goes away satisfied. He doesn’t have Internet access at home, but in future will ask his daughter to have a look at the westlothianonline website.

**Having information available at her surgery means Councillor Brown can provide immediate information for her constituents – not only for council run services, but also for services provided by other agencies, like road safety statistics collected by the police.**

## What needs to be in place to provide this service?

Mr Bruce's community smartcard will have been developed from the cards which have been issued for concessionary travel. The photograph on the card shows that it belongs to Mr. Bruce and just a look at the card is enough to show whether he is entitled to any concessions. Use of a card and a card reader is an easy way for Mr Bruce to identify himself and his interactions with the council.

The smartcard stores numbers which are unique to Mr Bruce. The most important of these is his Unique Citizen Reference Number (UCRN), which gives access to his Citizen Account. The UCRN also includes the Unique Property Reference Number (UPRN) for Mr Bruce's house. The number the National Health Service uses to identify Mr Bruce is actually printed on the card as well as being stored on it electronically. Very reassuring if Mr Bruce had an accident because it would give an authorised person like a doctor access to his most important medical records.

Using the smartcard with a security code is like using a credit card. It makes sure that personal information is only given out to someone who can identify themselves. Smartcards are a handy way of doing this, but if Mr Bruce does not have it with him he can log on to the web using more security codes. Different levels of security will be needed to access some information than is needed for others. Some of the information the councillor accesses on his behalf through the web - such as the bathroom and

kitchen programme and the accident statistics - would be available to everyone, including those people who have chosen not to have a Citizen Account. (Mr Bruce would not be able to vote online or benefit from concessions he is entitled to without a way of identifying himself). As well as this, allowing access to his Citizen Account details means that he does not have to type in his personal details every time he asks for a service.

Councillor Brown is able to ask Mr Bruce the appropriate questions about the support available for people with mobility problems by using the scripted text on the web site which asks the questions a specialist adviser would have asked, developing the questions in response to Mr. Bruce's answers. All the information Mr Bruce provides can be passed to the social care professional who will then have a good idea of his needs even before they meet. This is made possible by using electronic forms, which, when linked to an up to date appointments schedule, are also used to book an appointment. Mr. Bruce's booking is recorded as soon as it is made to avoid clashes with other people looking to book the same slot.

Mr Bruce's daughter, who has access to the web, could have found out all this information for her Dad. Mr Bruce prefers to speak to someone, either in person or on the phone. If he needs to change his appointment, he can do that by phone. All the records are integrated through the Customer Relationship Management (CRM) system and can be accessed through any channel Mr Bruce chooses.

## Next steps

The next stage in the development of the Customer Services Strategy will be to develop a more detailed action plan that sets out priority projects, the responsibilities and timescales.

The need for supporting policies and procedures has been identified throughout this document and these will be developed. These include:

- A consultation framework.
- Corporate Charter for Customer Service.
- Assessment framework for measuring effectiveness and efficiency.

A number of existing policies and strategies underpin this Customer Services Strategy and will help to achieve

the aims and objectives outlined in this document. They include:

- West Lothian Assessment Model
- People Strategy
- West Lothian Way – communications guidelines
- West Lothian Community Planning Partnership Community Engagement Strategy

These provide an excellent foundation to build upon.

## Monitoring and evaluation of the strategy

The strategy will be reviewed on a regular basis, involving managers from all services. This will form a feedback to elected members via the Performance Committee.



# Customer Services Strategy 2005-2008

## Glossary of Terms

### Customer First programme

National framework to support local authorities in their plans to deliver consistent and measurable improvements in local customer services, with a core objective of delivering public services at first contact with the customer.

### ICT

Information and communications technologies. This covers a range of telecommunication and computer technologies, which are being used to develop the way services are accessed and developed.

### E-government

Use of information and communication technologies to improve the activities of public sector organisations. Improvements to customer services and the overall delivery of public services can be made through a variety of web based channels.

### Locality planning

A local approach to joined up service planning and action. Working in particular neighbourhoods with all stakeholders, including local people, partners and council officers to improve and develop more community focused services.

### Civic Centre

The civic centre will house new headquarters for West Lothian Council, Sheriff and District Court complex and new divisional headquarters for Lothian and Borders Police. Other partners involved are the Crown Office Procurator Fiscal Service, Scottish Children's Reporter Administration Service, Lothian and Borders Fire and Rescue Service, and the West Lothian Community Health and Care Partnership. The project is intended not just to co-locate these services but enhance the services that are being jointly provided and maximise the synergies between them.

### West Lothian Assessment Model

Performance management system based on the European Foundation for Quality Management (EFQM), which lays the foundation for an improvement programme for the whole authority.

### The People Strategy

This strategy sets out what the council will do over the next three years to optimise leadership, people resources and people results. This strategy will support all staff in delivering continuously improving services

### Content management

System which allows users to access and update content on the council's web site.

### Community Engagement strategy

Community Planning Partnership strategy which sets out how we will engage with and strengthen relations with communities of West Lothian and outlines the activities that will be undertaken using Standards of Community Engagement.

### Customer Relationship Management (CRM) system

The CRM brings together information about the transactions we have with our customers. The council currently uses the Enquiry Tracking System.

### The West Lothian Way

A set of communications guidelines has been produced for staff, outlining good practice for communicating internally and externally.

### Scripted text

Scripted text is a tool, which enables customer advisers to respond directly to customers by using information about particular services and frequently asked questions. The script is owned, written and updated by the service to ensure accuracy.

### A-Z of services

Information and support on services currently available on the web which enables individuals to access information about services quickly and easily.

### Modernising Government programme

This is a long-term programme of improvement, which seeks to ensure public services are accessible to all by putting the customer first and focusing on the customer's viewpoint and is part of the government's agenda for modernising public services.

### Citizens' Account

An electronic Scottish Public Sector Customer Record, which will hold basic information about an individual, allowing them to update the record when required, therefore increasing access to the information held about them.

### Master Address Database

This is a list of properties in West Lothian which includes the unique property reference number, which is part of the Citizens' Account.

### Open Scotland Information Age Framework (OSIAF)

OSIAF is a set of standards making it much easier and less expensive to share data between software solutions.

### Document management system

This system manages the documentation received, which is scanned, indexed and stored electronically. This means that information is stored accurately and is easily accessible.



## Customers with special requirements

Information is available in Braille, tape, large print and community languages. Please contact the interpretation and translation service on **0131 242 8181**

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Text phones offer the opportunity for people with a hearing impairment to access the council. The text phone number is **01506 651115**. A loop system is also available in all offices.

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**Building for excellence** - a programme for change

Customer Services Strategy 2006 - 2009