



Broxtowe
Borough
COUNCIL



Report of the Overview and Scrutiny
Committee Working Group

Review of Telephone Answering and Customer Services

October 2022



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Summary

1. Broxtowe Borough Council's Overview and Scrutiny Committee established a review of Telephone Answering and Customer Services, to be carried out by the Overview and Scrutiny Working Group at its meeting 8 June 2022. The review was requested by Councillor P J Owen who suggested that there needed to be a focus on Key Performance Indicators, Customer Service Standards and the workflow of the telephone system in relation to the front and back office. The review is in accordance with the Council's Always Improving value providing continuous improvement and delivering value for money.
2. The review concluded on 29 September 2022 after collecting information from a range of sources and witnesses¹. Over the course of the review the group met three times, on 11 July 2022, 25 July 2022 and 8 September 2022.
3. The purpose of the review was to achieve the outcomes outlined in the scoping report². The review sought the following outcomes:
 - To answer calls within an agreed amount of time.
 - Functionality of online Customer skills.
4. This report sets out the review process that was adopted, options considered and the conclusions and recommendations.

¹ The list of appendices is attached at appendix 1.

² The scoping report is attached at appendix 2.

Members of the Overview and Scrutiny Committee Working Group

1. The Working Group was chaired by Councillor P J Owen, with Councillor M Hannah as the vice chair.
2. Three other councillors were part of the Working Group:
 - Councillor S Easom
 - Councillor I L Tyler
 - Councillor J C Goold.
3. The Working Group was assisted by Philip Sudlow, Head of Revenues and Benefits, Lisa Evans, Democratic Services Manager, and Jeremy Ward, Head of Governance.

Recommendations

It is recommended to the Overview and Scrutiny Committee that the following recommendations be forwarded to Cabinet:

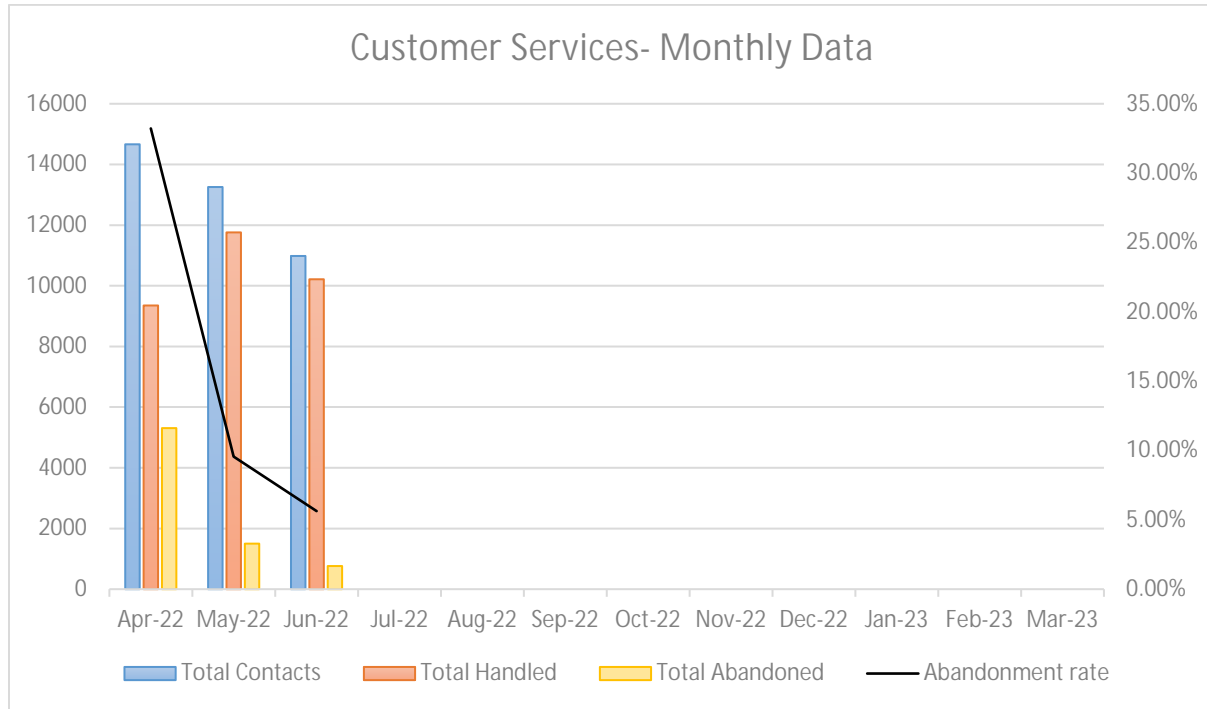
1. Staffing contingency arrangements be considered for the Contact Centre during peak times in order for residents' calls to be answered, in addition to the use of market supplements to address staffing issues.
2. Key Performance Indicators be introduced in relation to departmental call answering data to monitor performance and provide feedback.
3. The answerphone greeting should be standardised across the Authority and be conducted by the Individual Officer. For all Officers to follow a set process of answering calls across the Authority. Officers should only use answerphone messages if they are away for no more than 24 hours and messages should be replied to the following working day. If Officers are to be away for longer the call would enter a hunt group to be answered by a colleague. This should be included in the Customer Services' Strategy.
4. The phone message that reminds customers of the possibility of resolving issues by visiting the Council's website to be reviewed, the length of the message reduced and repetition of the message reduced.
5. That a Scrutiny topic be added to the Work Programme: Service Provided by the Duty Planning Team and Acknowledgement of Calls.

Background

1. The topic was suggested by Councillor P J Owen to consider telephone answering and customer services.
2. The review was scoped at the meeting of Overview and Scrutiny Committee on 9 June 2022 where the Scrutiny Working Group was allocated the review, which sought to provide an update on Customer Services, with a particular focus on call abandonment rates and the functioning of the Customer Services Centre.
3. During the investigation the focus expanded to include the application of customer services standards across the workforce, especially the monitoring of back office calls and answerphone greetings. Consideration was also given to hunt group calls, customer services contingencies and the approaches being developed by the Head of Revenues, Benefits and Customer Services to manage demand at peak times.
4. Consideration was also given to particular issues within the Planning and Environment services. The Working Group queried whether the Duty Planning Service should be free and was it part of the Planner's job description. It was suggested that this could be a separate scrutiny topic to recommend to the Overview and Scrutiny Committee, namely the Service Provided by the Duty Planning Team and Acknowledgement of Calls.

Service Data

1. The Customer Services department is monitored on a number of Performance Indicators, ranging from Telephone Abandonment Rates through to Number of Calls received. These are represented below in respect of quarter 1 of 2022/23 financial year.



2. The graph provides an improving level of service for the first three months of the year. There were a number of contributing factors to this improvement which include a greater presence of Customer Services Officers within the Council Building, a higher level of scrutiny from the Head of Revenues, Benefits and Customer Services, regular 1-2-1's with the team, working with the ICT services to resolve issues quicker and a reduction in the number of queries received in relation to initiatives such as Council Tax Energy Rebate.
3. Further data was provided on abandonment numbers across departments. The data provider was new to the Council and the data available was for the month of August only. The information had indicated sizeable call abandonment within Housing Operations and Housing Income, this was mainly due to the high calls in the first instance and areas where staffing was remote at times. Work was being undertaken to look at arrangements with Customer Services to support the call handling. Monthly reports on call abandonment would be sent to Heads of Services for greater scrutiny with individual staff and service delivery.

Conclusions

4. It was positive that there had been improving levels of call answering but a fluctuation caused further concern. It was considered that peak times could often be predicted, usually around Council Tax bills being despatched in the new financial year, and currently around contacting residents. It was agreed that contingency be considered for staffing arrangements during peak times in order for residents' calls to be answered.
5. Key Performance Indicators should be introduced for departmental call answering to monitor performance and provide feedback.

Customer Services Standards

1. The Working Group identified a generic standard for customer services that all employees of the Council would work towards. It was proposed that this should include this within the Customer Services Standards and ensure that it is communicated throughout the Council. The recommended standards are as follows:
 - Clear greeting explaining the department they have called and who they are talking to.
 - Calls returned within one working day.
 - A telephone interpreting service for people with disabilities or those who speak other languages.
 - Clear written communications which follows the 'Communications For All Principles'
 - Focused** – clear, concise and jargon free.
 - Open** – communications should be factual, accurate, reflect the position of the council and be approved by relevant Senior Managers.
 - Relevant** – Communicated to the right people, at the right time, in the right way and be informative and useful.
 - Accessible** – easy to access through appropriate channels and in a variety of formats suitable for those with disabilities and inclusion needs.
 - Listening** – provides opportunities for feedback and two-way conversations wherever appropriate.
 - Linked up** – internal stakeholders and partners should hear about changes or issues before they reported by a third party or in the media.
 - Accessible services.
 - Waiting times are kept to a minimum.
 - To be treated fairly and with respect.
 - Requests resolved at the first point of contact in 80% of enquiries.
2. It was considered that standards currently varied across the Council in relation to telephone answering and also the use of voicemails. Members often considered

that messages were either not responded to by the individual officer or messages were not passed to colleagues for a response.

Conclusions

3. A standard for answering telephones should be introduced into the Customer Services Strategy and by reinforcing set standards this should ensure levels are raised.
4. The use of answerphone messages should be standardised and checked regularly by the relevant Head of Service. This will form part of the Customer Service Strategy but will include the following:
 - Answerphone greeting conducted by the individual officer
 - Identify the name of the officer contacted
 - Identify the department contacted
 - Where the officer is going to be away for a period exceeding 24 hours, then calls should be forwarded to another officer or hunt group.

Telephone workflow

1. The Customer Services Team is currently responsible for answering calls in relation to eight Council Services as well as switchboard, these are:
 - Council Tax
 - Business Rates
 - Housing Benefits and Council Tax Support
 - Housing Rents
 - Housing Repairs
 - Street Cleansing
 - Grounds Maintenance
 - Refuse
2. When contacting the Council using the 0115 9177777 telephone number, you will be provided a number of options, which will be in line with the above services and handled by multi-skilled Customer Services Officers. Recently, a few additional services have been included to these options, such as Housing Allocations, but these calls are direct to the Back Office Team.
3. Each of the eight services represents a queue within the Council's Cisco Contact Centre telephone system. Each of these queues has customisable number lengths. This allows the Customer Services Team to determine the number of calls in the queue before any other calls received are transferred to the back office, and follow the same process as detailed below. These queue lengths are varied based on a number of factors, including service need, staffing levels etc.
4. Where a call is for a service not dealt with by Customer Services, they will go through to the switchboard and redirected from there. Once transferred from switchboard, the call is no longer in the control of Customer Services and will be handled by the relevant back office Team.
5. The Back Office Teams have been set up, using the Microsoft Team platform, on the basis of their request but most will have a set telephone number that is contacted and this acts as a hunt group and directs between the individuals within the specified team until the call is answered. An example of this is in appendix 1 showing the flow of calls going in to the Quality and Control Team. Other examples can be provided during the meeting.
6. Each service area will be set up slightly different but the main basis will be the same. If contacting a telephone number directly, such as calling 0115 9173236 to speak to the Head of Revenues, Benefits and Customer Services, then this will be configured by the individual in question. All will have the facility to redirect their calls to the hunt group in question for their department and have an answer phone with a customisable greeting.

Conclusion

7. Members highlighted the message that is played during the process of being connected that reminds customers of the possibility of using the Council's website to interact, should be regularly reviewed.

Planning and Environment

1. The Working Group requested information from the Head of Planning and Economic Development and the Head of Environment for feedback in the way in which their teams are set up to deal with telephone calls.

Planning

2. "In planning, we have a duty call system that operates between the hours of 1030-1230, where a duty planner is available to answer planning queries. This system works well, and indeed we have the lowest call drop off rate in the Council and we have worked very hard to ensure this service is delivered successfully. If, for any reason, customers cannot get through to an officer, messages are taken and emailed to the relevant officer, who calls back later that day.
3. This system works well in planning, and enables planners to focus their main efforts on planning applications and other paid planning work at other times of the day. It is unfortunate that we cannot have this call system operating for longer periods of time, but workloads have increased by 20% and due to current work pressures this is not possible."

Questions from the Group to the Head of Planning and Economic Development

4. How much time are your planners out of the office?

At least one full day a week officers are out on site visits, but this can vary immensely based on workload and the complexity and number of sites. Often they are on site meeting people/ public/ agents at pre-determined times.

5. Can greater clarity be provided on why the hours of contact for the Duty Planner is 10:30 to 12:30?

Workload. The Duty planner service, is a free service where we give generic planning advice to members of the public. The majority of our work relating to 'Core Planning' which is making and establishing planning policy or assessing and determining planning applications and/ or enquiries. Applications and enquiries all

require a fee, and have to be determined within in certain time frames. This work obviously therefore takes priority.

6. What would the duty planner be doing when not on the phone?

Their case load of planning applications or enquiries, writing reports, assessing information, out on site, discussing amendments, etc...

7. Could a planner have a mobile phone that they take out on site with them to answer calls outside of the 10:30 to 12:30.

No. When they are out on site they are dealing with other areas of work, and often meeting people on site, and or making notes on planning applications. It is not practical or reasonable.

8. What levels of additional resources would be needed to be able to extend the hours of 10:30 to 12:30?

More planners. We are really struggling to keep up with the workload currently, which was up 20% in 2021. We have to prioritise the paid applications and core work over the 'free service' we provide. Many Councils both regionally and nationally do not have any duty planning system at all. Several others have one or two mornings a week or similar, and indeed these are often 'manned' by back office or administrative staff, not planning officers, as is the case here. Indeed, if workload continues in the current vein, the current duty rota will be reduced further. This is not a favourable route, or one we wish to take, though it may get that far. Everybody has an opportunity to write into the Council and pay for planning advice as a pre application enquiry. Whilst not binding, this service does provide members of the public with more comprehensive responses than can ever be given over the phone. This route also reduces the level of error or misinterpretation, as advice is in writing, rather than verbally.

Environment

9. The Head of Environment provided information as follows:

10. "The calls at Kimberley Depot are primarily based on service areas with appropriate pick up and diversion on phone lines being in place. A review of the phone navigation system has recently taken place and some further improvements have been made to the routing of calls to improve the customer experience. The phones are open from 8.30am to 17.00pm Monday to Thursday (16.30pm on Friday)."

11. Where we receive a request for a service, we aim to deal with these as quickly as possible. However, we have to acknowledge that the length of time taken with vary significantly depending on the service request. A simple request may take a matter

of hours to resolve where a more complex one might take several weeks. All formal complaints are managed within the Council's Complaint procedure and timelines.

12. I am aware that the Council has recently purchased additional telephone reporting software that will provide my service areas with greater clarity of what calls are received. Once we are able to obtain this data on a regular basis, we will be able to identify potential service improvements.”

Conclusion

13. It was considered that the responses around the Planning service did not resolve issues around duty planners. There would be a request to the Overview and Scrutiny Committee to consider a further review into this subject.

Conclusions

1. It was positive that there had been improving levels of call answering but a fluctuation caused further concern. It was considered that peak times could often be predicted, usually around Council Tax bills being despatched in the new financial year, and currently around contacting residents. It was agreed that contingency be considered for staffing arrangements during peak times in order for residents' calls to be answered.
2. Key Performance Indicators should be introduced for departmental call answering to monitor performance and provide feedback.
3. A standard for answering telephones should be included in the Customer Services Strategy and by reinforcing set standards this should ensure levels are raised.
4. The use of answerphone messages should be standardised and checked regularly by the relevant Head of Service. This will form part of the Customer Service Strategy but will include the following:
 - Answerphone greeting conducted by the individual officer
 - Identify the name of the officer contacted
 - Identify the department contacted
 - Where the officer is going to be away for a period exceeding 24 hours, then calls should be forwarded to another officer or hunt group.
5. Members highlighted the message that is played during the process of being connected that reminds customers of the possibility of using the Council's website to interact. It was suggested that this message should be reviewed regularly.
6. It was considered that the responses around the Planning service did not resolve issues around duty planners. There would be a request to the Overview and Scrutiny Committee to consider a further review into this subject.

APPENDIX 1

The following is a list of witnesses who gave evidence to the Working Group:

Date	Witness
25 July 2022	Head of Revenues, Benefits and Customer Services*
8 September 2022	Executive Director
8 September 2022	Head of Planning and Economic Development, in writing
8 September 2022	Head of Environment, in writing

* present at more than one meeting

Scoping Report

Title of review	Telephone Answering and Customer Services		
Expected outcomes	To answer calls within an agreed amount of time. Functionality of online Customer skills		
Terms of reference/Key lines of enquiry	<p>Are Key Performance Indicators being met? Cold calling to test the procedure How is data currently being collected. How many calls are unanswered? Look at the handover procedure to the back office. Look at complaints Staffing levels of customer services and volume of calls into customer services. Look at officer working times and peak call times Options on the telephone to the customer Update on the replacement telephony solution.</p>		
Possible sources of information	<p>Operating procedures Evidence from Officers-Head of Revenues, Benefits and Customer Services, Manager of Customer Services, Councillor, Residents. Cold calling List of complaints Key Performance Indicators</p>		
How review could be publicised	<p>Email Me Social Media Comms channels speak to Comms Team Website</p>		
Specify site visits	Visit to Contact Centre.		
Possible witnesses	<p>Head of Revenues, Benefits and Customer Services, Manager of Customer Services, Councillor, Residents. Data Controller Residents</p>		
Resource requirements	Officers and Members		
Projected start date	08.06.2022	Draft report deadline	
Projected completion date	10.11.2022		