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<b>Title</b>	<b>Customer Access Strategy</b>
<b>Report of</b>	Head of Customer Strategy & Programmes
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<b>Urgent</b>	No
<b>Key</b>	Yes
<b>Enclosures</b>	Appendix 1 – The Draft Customer Access Strategy Appendix 2 – Equalities Impact Assessment Appendix 3 – Public Consultation Feedback
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## Summary

The draft Customer Access Strategy (CAS) was approved by Policy & Resources Committee in December 2015 subject to consultation. This report updates the Committee on the results of that consultation, and recommends the CAS as attached in Appendix 1 for approval.

The consultation feedback has been used to update the equalities impact assessment for the CAS, an appendix to this report. The feedback did not contain any issues that were not already considered as part of the draft CAS and therefore no changes have been made to the CAS.

The consultation feedback also offers valuable data to support the Council's development of the Digital Inclusion Strategy, which was one of the core recommendations of the Customer Access Strategy, to ensure that the Council's shift towards greater customer self-service using the website will not prevent anyone in Barnet's community accessing the

services that they need.

This Digital Inclusion Strategy is currently being written and will be reported to Policy & Resources Committee in October 2016, along with a business case for the whole Customer Access Strategy that will set out the costs, benefits, the different projects needed, and a recommended implementation timeline. This business case will require another update to the equalities impact assessment, setting out any mitigation required once the details of service change are understood.

Understanding and mitigating the impacts of all changes on customers is an ongoing responsibility that will be undertaken throughout the implementation of the Customer Access Strategy.

## **Recommendations**

The report recommends that the Committee:

1. Approves the Customer Access Strategy as attached at Appendix 1 as the final version of the Strategy
2. Approves the plan to bring a detailed business case, updated equalities impact assessment and Digital Inclusion strategy for the Customer Access Strategy to this committee for approval in October 2016

## **1. WHY THIS REPORT IS NEEDED**

- 1.1. The draft Customer Access Strategy (CAS) was approved by Policy & Resources Committee in December 2015 subject to consultation. The consultation was conducted for 8 weeks between 18th January –14th March 2016. The findings are shared in this report and included in full as an appendix.
- 1.2. The consultation was open to everyone, but publicised to those currently using customer services, particularly in the face to face centres, and also publicised to groups representing residents with disabilities.
- 1.3. The questions focused on:
  - internet skills
  - views on accessing services via the internet and automated telephony
  - the proposals to pilot 8 services as self-service only and
  - the proposals to change face to face access when Barnet House closes.
- 1.4. This report sets out the findings, and also assesses their implications for the key proposals of the CAS. It concludes that no changes are needed to the CAS but the accompanying Equalities Impact Assessment has been updated and the consultation findings are being used to support the development of the Digital Inclusion Strategy.
- 1.5. This report therefore recommends that the Customer Access Strategy as attached at Appendix 1 is approved as final by the Committee.
- 1.6. The Council's vision for customer access is that by 2020 it will be simplified and primarily 'digital by default', offering efficient resolution and services joined up across the Council, partner agencies and the community sector. Digital by default means that the digital services are so good that the majority of customers prefer to use them, as is the case with online shopping and banking. Of course not all Council services will be delivered digitally – for some services personal contact is essential, and for some customers, digital access will not be possible. But there is scope for a far greater proportion of customer transactions to be completed online than is currently the case, and to encourage this, we have to deliver an excellent online experience and build customer trust that this method of accessing services is efficient and effective at the delivering the required outcome.
- 1.7. The value of the consultation feedback is primarily in helping the Council design appropriate services and an effective Digital Inclusion strategy. It is therefore helpful that people with disabilities were overrepresented amongst respondents. However it is not a statistically representative sample of the Barnet population so is not a substitute for the statistically representative data we have about digital access and usage within Barnet.
- 1.8. Dot Everyone (formerly called Go ON UK) is a national charity working to bring basic digital skills to the adults in the UK that lack them. They commissioned the London School of Economics and Political Science to devise a Digital Exclusion

Heatmap of the UK. This heatmap uses data from agencies including the Office for National Statistics, Ofcom, HM Revenue and Customs and research carried out by Ipsos MORI to show exclusion at Local Authority level. This research us that 81% of adults in Barnet have all 5 basic digital skills and only 10.5% of adults in Barnet have never been online.

- 1.9. Therefore whilst Barnet has a more digitally able population than the UK as a whole, Council services are accessed far more by telephone than via the website, demonstrating the gap that the Customer Access Strategy seeks to bridge.

## **2. SUMMARY OF THE CONSULTATION FINDINGS**

- 2.1. 119 responses were received, which is a good response for such a broad corporate strategy. 60% of responses were completed via the online survey, 40% were completed using the paper copies made available in the face to face centres.

- 2.2. The proportion of respondents with a disability was 25%, significantly higher than the proportion in Barnet's population, which is just 6%. However, the proportions of respondents aged under 35 (who tend to be digitally skilled) and over 75 (higher likelihood of digital exclusion) were lower than the proportions in Barnet's population. 89 respondents supplied their postcode which showed a wide geographic spread, but the highest proportion from the HA8 area, covering Edgware and Burnt Oak, close to the Burnt Oak customer access centre.

- 2.3. The key findings were as follows:

- The majority of respondents (75%) said that they currently use the internet to access information, goods or services.
- 74% of respondents said they were very or fairly confident using the internet. 17% said not very confident, but only 9% of respondents said they were not at all confident in using the internet.
- 84% of respondents had accessed at least one of the 8 services that were recommended for self-service only pilots.
- 56% of respondents preferred self-service to be via the website rather than via automated phonelines. 16% had no preference, 8% preferred automated phonelines, and 20% said they would not be able to use either self-service or automated phonelines.
- When asked how they would access these services in the event that they were only available online, 56% of those answering the question said they would need no help, 30% said they would obtain help from someone else (options included from Council staff, family, carers and volunteers), and 14% said 'other' which was largely used to express opposition to services being only available via online self-service.

- Only 46 respondents answered the question about what support would be needed in the event that these 8 services became self-service only. There were many different answers given but the strongest theme was the need to improve the website.
- On the subject of face to face services being moved away from Barnet House into a range of different locations including North Finchley library, only 60 respondents answered the question about whether it would stop them using services, and of these, 36 said it would. Only 17 respondents offered a reason for this, with travel difficulties being the most common.
- The Council also ran a session with Inclusion Barnet, which involved obtaining feedback about the Council's move towards digital self-service from around 20 residents with a range of different disabilities, both physical and learning. The majority of these participants were active internet users, particularly of social media and the mobile messaging app WhatsApp, and particularly via tablet/mobile devices rather than desktops or laptops. Of those who currently did not use the internet, there was a general willingness to be taught how to use it, and the recognition that it could make their lives easier and improve accessibility.

### **3. IMPLICATIONS FROM CONSULTATION FINDINGS ON THE CAS RECOMMENDATIONS**

#### **Digital Service provision; Website functionality**

- 3.1. The Customer Access strategy proposed that it must be made easier to actually access a service online, than just find a phone number. The recommendation is that digital service provision should be a priority for services, because telephone contacts are more expensive than online contacts when these online services are well-designed and well-integrated with service systems.
- 3.2. The Customer Access Strategy also proposes that the IT Strategy supports the delivery of digital services for customers, such as GIS mapping information.
- 3.3. As stated above, the majority of respondents to the consultation (75%) already use the internet to access information, goods or services, which is slightly lower than is true for the population as a whole (81%), but nonetheless a strong indication that amongst a group of people most concerned about changes to customer access, the vast majority are digitally able.
- 3.4. There were some concerns expressed about a 'self-service only' approach, and useful pointers about what further support would be needed, such as better online content (28%), a preference for face to face (17%), 'back up' via

phone or face to face (13%), and a concern for people with disabilities (13%), all of which will help us design the Digital Inclusion strategy.

- 3.5. No changes are needed to the recommendations.

### **Piloting digital/self-service only solutions**

- 3.6. The Customer Access Strategy proposed that a number of services be tested as pilots for “digital only” services, with staff contact reserved only to meet specific special needs, and to assist customers to self-serve. It should be noted that “digital” may include automated telephony solutions where these best meet the needs of customers.
- 3.7. The current phase of the Customer Transformation Programme is analysing these opportunities in more detail in preparation for the business case to Policy and Resources Committee in October 2016.
- 3.8. As described in paragraph 2.3, of the 119 respondents, 84% had used one of the 8 services, and web self-service was more popular amongst than automated telephony, so this is where the emphasis will be.
- 3.9. The Digital Inclusion Strategy that will accompany this business case will provide the detail about how customers unable to self-serve will be supported, taking into account the detailed feedback given.

### **Digital Inclusion**

- 3.10. The Customer Access Strategy proposes that a Digital Inclusion strategy is developed to identify how the Council will support and enable access to services where online access is difficult or not possible. No change is needed to this recommendation, but the consultation findings offer a useful insight into the views of people who express concerns about accessing services online.
- 3.11. The Customer Access Strategy identified that while 82% of Barnet residents are willing and able to use digital channels, the remaining 18% were likely to be the key users of our services. We know that within the 18% there are people who have access to digital channels but choose not to use them. The proposals around assisted self-service in libraries and the commissioning of services via community hubs potentially provide the basis of a mitigation of the impact of moving to a digital-only approach in some areas. Section 4 discusses some emerging thinking from the Digital Inclusion Strategy work so far and the CAS Equality Impact Assessment is included in Appendix 2.
- 3.12. Inclusion Barnet is a peer-led organisation that promotes accessibility for disabled people. Around 20 residents with a range of different disabilities (physical and learning) attended a workshop about the Customer Access Strategy on 19 April. The full notes from this meeting can be found within the CAS Consultation Report in Appendix 3. General themes emerging from it included:
- Use of social media, like Facebook and WhatsApp, being the most prevalent form of internet use.

- Those who do access the internet tended to use it via tablet/mobile devices rather than desktops or laptops as they are more intuitive for those with learning difficulties and easier to handle for those with physical disabilities.
- There was a general preference to use the website if it works properly, but alongside that a concern that issues reported online might get “lost in the system”. Because of this impression that online reporting and communication is less accountable, several attendees indicated a preference for face to face or phone contact.
- Of those who currently did not use the internet, there was a general willingness to be taught how to use it, and the recognition that it could make their lives easier and improve accessibility.

### **Telephone Contact Centres**

- 3.13. The Customer Access Strategy makes the key proposal that all Barnet calls should operate through the CSG infrastructure and contractual arrangements. Therefore, the recommendation was for a review of all remaining Barnet based call centres to assess future options.
- 3.14. The Customer Transformation Programme business case will include a review of the options for the call centres supporting Barnet and any consolidation or use of common technologies in line with the Customer Access Strategy.
- 3.15. The consultation noted that a barrier to accessing services digitally was having confidence that additional needs could be still met via phone or face to face. 25% of respondents were not currently internet users, supporting a continued need to provide a professional telephone customer service centre.
- 3.16. Therefore, there is no evidence from the consultation that this proposal should be changed, and it will support those who need phone access.

### **Re-designing customer journeys end-to-end**

- 3.17. The Customer Access Strategy proposed, following discussions with delivery units, that a number of key customer journeys be identified and detailed end to end customer journey mapping take place. These detailed mappings and recommended changes to the customer journeys are in progress as part of the CTP business case and will be presented to October Policy and Resources Committee.
- 3.18. The redesigned journeys will take account of the consultation feedback.
- 3.19. Therefore, there is no change to this proposal, and the findings support better digital services that are very easy to use.

### **Customer/Business Intelligence (BI).**

- 3.20. The Customer Access Strategy proposed that a Business Intelligence strategy needs to ensure that high volume customer related data is available across all services, and all delivery units make customer related data available to

customer/business intelligence systems used by Barnet Council. This is in order that we fully understand our customers and can design more customer-friendly services as a result.

3.21. There are no implications from the consultation on this recommendation.

### **Social Media and Apps**

3.22. The Customer Access Strategy recommended that customer journey mapping projects consider the role social media might play in improving the customer experience for the individual services being reviewed.

3.23. The Customer Access Strategy proposes that 'apps' should be piloted to compare the cost differences and customer take-up between a web-based approach and an app-based approach.

3.24. The consultation questionnaire did not specifically ask any questions about social media or apps, but the Inclusion Barnet meeting found that use of social media was popular, particularly via mobiles and tablets. This suggests that social media may be an important component of designing accessible digital services and the Digital Inclusion strategy.

3.25. 'Apps' are often much more simple and easy to use than websites, and so this simplicity should be a key design principle.

### **Demand management and community participation**

3.26. The Customer Access Strategy primarily focuses on customer access to Council services, but in parallel the community participation project is working to establish a stronger role for the community in delivering services and supporting residents.

3.27. The Customer Access Strategy recommended that Commissioning Directors identify, with their theme committees, how they wish Customer Services to promote community opportunities for the services they commission.

3.28. Section 4 identifies that there are voluntary and community groups already supporting digital inclusion, which the council needs to better understand.

3.29. This recommendation is not impacted by the consultation.

### **Face to Face**

3.30. The Customer Access Strategy proposed how face to face services currently offered at Barnet House might be re-located, or moved to the telephone or online access methods, and these changes were presented in detail in the consultation for respondents to comment on.



- 3.31. 55% of 110 respondents answered that they had visited or were planning to visit Barnet House in the near future to access the Council's customer services.
- 3.32. When asked reasons for visiting Barnet House, just under half of respondents (49%) cited preference over face to face interaction. Sixty respondents answered the question on whether they thought the proposed changes would stop them from accessing services and of this, over half of them (36; 60%) answered that it would.
- 3.33. The most common reasons why respondents felt they would not be able to access the services are:
- Issues relating to transport (41%)
  - Not being able to use the internet or not having access to the internet (18%) and
  - Not being unable to resolve issues over the phone, concerns about resolving the issue online or a preference for face to face (18%).
- 3.34. Other responses included concerns specific to Colindale, for example:
- Safety (12%),
  - Concerns that the new services would not be up to the same standards as the current services (6%) and
  - Needing to discuss confidential information (6%).
- 3.35. The questions relating to support for online access identified that a minority of the respondents (17% out of 46 responses) only wanted face to face services. The question that asked about accessing online services identified that 25% of respondents were not currently internet users. The principle reasons for not accessing online services was not feeling confident; having a disability preventing access, or preferring the face to face they currently receive.
- 3.36. An email was sent out to Members regarding the consultation and this prompted a separate response from the Labour Group. The key concerns highlighted in this response include libraries not being an adequate replacement for Barnet House and the need to improve service standards and integrate services better.
- 3.37. Given the interdependency with the Locality Strategy, the face to face recommendations are being presented as part of this strategy to the Assets, Regeneration and Growth Committee, which will take account of the above feedback.
- 3.38. Additionally, the Digital Inclusion Strategy being presented to Policy and Resources Committee in October will cover concerns and strategies to minimise the impact to any digitally excluded residents.
- 3.39. Therefore, the proposal is not changed by the consultation, but is strengthened by the consultation as there is a need to address the needs of

those who use face to face services, and those who may not be able to go online and where phone is also insufficient for their needs.

#### **4. DEVELOPMENT OF A DIGITAL INCLUSION STRATEGY**

4.1. A key focus is to ensure digital services are designed inclusively, so that as many people as possible can use them, including people with special accessibility needs and those who have limited access or confidence in online services. The CAS presented in December 2015 included a number of key proposals to mitigate the risks of people not being able to go online:

- a) The principle mitigation is the ongoing improvement of the telephone contact centre. The CSG telephone contact centre already includes a service for vulnerable customers who need additional support, and this service will be increased as required, because moving 80% of contacts online will increase the proportion of customers who need it. For example, once customers who are digitally excluded are identified, one option would be to encourage customers to register one or more phone number which the system would recognise when they phoned, directing them to the enhanced service with specially trained advisors.
- b) Face to face services will be provided where needed to deliver the service, or where the personal circumstances require face to face.
- c) In addition, automated telephony will be utilised in addition to web self-service.
- d) The Digital Inclusion Strategy will further develop initiatives to support those who would benefit from going online but are not currently able.

4.2. In addition, the work on the Digital Inclusion strategy and the consultation with Inclusion Barnet has identified that there a range of other organisations that are already working with Barnet residents, and that could be directed specifically to work with the excluded groups to enable more people to access the skills and technology, so that they can move from being excluded to digitally included. The actions arising from the Digital Inclusion Strategy will all further mitigate the risks of digital exclusion by aiming to reduce the number of people who are excluded.

4.3. The older population are more likely to be digitally excluded. This was further evidenced in the consultation. The Digital Inclusion Strategy will have a focus on the needs of the 75+ age group to ensure engagement and make sure that their views are taken into account.

4.4. From the analysis conducted so far under the Customer Transformation Programme, the areas of required action within the Digital Inclusion strategy are:

- a. The need to identify sources of funding. E.g. There is funding available for some excluded groups to support online access and IT skills, and this be further explored as part of the Digital Inclusion Strategy analysis.
- b. Partnership working. E.g. Age UK has a digital literacy class which is over-subscribed.

- c. Staff and community digital skills. E.g. identify those staff and community volunteers who would benefit from more digital skills training, so that they in turn can support service users and support skills transfer.
- d. Assistance for customers to use digital services. Telephone and face to face customer service staff have a key role to play in supporting residents gain confidence in moving to digital.
- e) Service design. Experience based co-design techniques will be used to ensure that online systems are designed and tested by those people who have least confidence to ensure the design is straightforward, and do not required advanced digital skills to access. Service design will focus on services being simple to use and accessible from a touch-screen devices such as a tablet, ipad or large smartphone.
- e. Improving resident's access. In order to access the best deals on digital devices and connectivity, specialist advice can be given to those who are excluded to access 'entry-level' devices. E.g. many people who are not online are overestimating the cost of an internet connection and a device, providers of devices and connections focus their marketing campaigns on the latest models and high end functionality.
- f. Promoting the benefits. Those who are digitally excluded and not online, or who are online but with limited skills are not always aware of the benefits that online banking or social media can bring. E.g. for people whose disability prevents them leaving their home, or with limited mobility can find online services opens up opportunities for accessing goods / services and social connections.

## **5. REASONS FOR RECOMMENDATIONS**

- 5.1. The strategy is needed to achieve the Council's vision for customer services in 2020 to make the development of digital services one of the key priorities for Customer Services; whilst ensuring access to services is provided through phone or face to face where required, and where additional support is needed, or where there is no online access to services for a resident. Investment will also enable the release of savings that contribute to the Council's overall savings target.

## **6. POST DECISION IMPLEMENTATION**

- 6.1. The feedback from the eight week period of public consultation supports the Customer Access Strategy and impact assessments have been completed.

## **7. IMPLICATIONS OF DECISION**

### **Corporate Priorities and Performance**

- 7.1. Barnet's vision for 2020 in the Corporate Plan is to have redesigned local services that are integrated, intuitive and efficient, making life simpler for our residents and customers. This strategy outlines how this vision will be delivered.

### **Resources (Finance & Value for Money, Procurement, Staffing, IT, Property,**

## **Sustainability)**

- 7.2. A business case is being developed to assess the investment needed to implement this strategy and the financial and non-financial benefits that it can produce. This will need to show that the investment will provide appropriate returns in addition to improving customer service. The outcome of this will be reported to this Committee in October.

## **Social Value**

- 7.3. The proposals outlined in this report seek to ensure that accessing the Council's services is a more efficient and effective experience, that services are more transparent and accountable to the customer, that more information and services are available online so that customers can access them at a time of their choosing, and that barriers preventing customers accessing online channels are addressed through a Digital Inclusion Strategy.

## **Legal and Constitutional References**

- 7.4. Due to the nature of the changes proposed, a full Equality Impact Assessment and public consultation was required.
- 7.5. The proposals in the Customer Access Strategy are compliant with the legislative frameworks governing the services covered in the Customer Access Strategy. Where legislation mandates face to face access for clients or customers, this will be provided.
- 7.6. Council Constitution, Responsibility for Functions, Annex A, sets out the terms of reference of the Policy and Resources Committee including:  
'To be responsible for the overall strategic direction of the Council including customer care, communications and resident engagement activities.'

## **Equalities and Diversity**

- 7.7. An Equalities Impact Assessment has been completed and updated with the outcome of the public consultation. It identified four of the protected characteristic groups that could potentially be negatively impacted; Pregnant/maternity leave; ethnicity; disability; and age, and details the planned mitigations contained within the CAS. It concludes that the combined changes proposed by the strategy will not detrimentally impact customers with protected characteristics. The EIA is included in Appendix 2.
- 7.8. Understanding and mitigating the impacts of all changes on customers is an ongoing responsibility that will be undertaken throughout the implementation of the Customer Access Strategy.
- 7.9. The development of the business case will require another update to the equalities impact assessment, setting out any mitigation required once the details of service change are understood.
- 7.10. The strategy recognises that there is a section of the community for whom face to face and telephone channels will continue to be needed and certain services where face to face access is required to achieve the optimum

outcome. The proposed changes to face to face should not exclude any customer from accessing a service they need.

- 7.11. In addition, a key aim of the strategy is to redirect valuable staff resources to where they are most needed, supporting residents who have more complex needs. Given the need to make savings, it is vital that we design out unnecessary interactions and automate transactional services as much as possible.
- 7.12. The data tells us that at least 81% of Barnet residents are competent, regular internet users, yet around 80% of our contacts are still by phone, because we are not providing sufficient visibility to customers over the progress of their requests, and manual processing by staff can lead to delays and errors. This means that investment in making services more digital, end-to-end, and accessible via self-service, will be welcomed by the majority of the borough's residents.
- 7.13. The strategy seeks to support customers less able or confident using the website or other self-service options through assisted self-service.

#### **Consultation and Engagement**

- 7.14. This report summarises the findings from the consultation that has taken place.

#### **Insight**

- 7.15. The strategy makes extensive use of the most recent insight data available, including data from customer satisfaction surveys.
  - 7.16. The Council has a set of design principles for a positive customer experience that were developed in autumn 2013 through workshops with residents representing the diversity of Barnet. These principles will be used to design changes to customer access.
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