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## **A NEW CUSTOMER STRATEGY FOR SCOTTISH BORDERS COUNCIL**

**Report by Service Director Customer and Communities**

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### **SCOTTISH BORDERS COUNCIL**

**25 September 2018**

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#### **1 PURPOSE AND SUMMARY**

- 1.1 This report proposes a new Customer Strategy for Scottish Borders Council for the period 2018 – 2023 which re-focuses Scottish Borders Council's (SBC) approach to designing and delivering services, putting the customer at the heart of what we do and making the most of current and emerging digital technology.**
- 1.2 For a variety of reasons, including changing customer expectations, reducing resources, increasing demand for services and developments and investment in digital technology, the need has been identified for a new strategic approach to dealing with customers across SBC services.
- 1.3 In a large rural area, and across a large organisation, there are a number of challenges to overcome including changing the way customers contact SBC, improving and streamlining business processes and ensuring consistently excellent customer care across all services. There are also some cultural challenges within SBC due to, for example, departmental "silo" structures.
- 1.4 Against the context of SBC's new Corporate Plan (Our Plan and your part in it) and the **#yourpart** campaign that underpins it, SBC has now developed a new customer strategy that puts the customer at the heart of service design and delivery, presented at **Appendix 1**. It articulates SBC's vision for the future, how it will be delivered and how SBC will measure success, including gathering customer views on satisfaction and measuring how customers contact and interact with SBC, and how this changes over time.
- 1.5 As technology will play a key part in SBC's future customer facing arrangements, SBC has established a Digital Customer Steering Group (DCSG) as part of the Digital Transformation Programme, chaired by the Service Director, Customer and Communities. Although established to ensure that both staff and communities have the skills necessary to maximise the investment that SBC is making in digital technology, DCSG has the membership to ensure it can oversee the implementation of the new Customer Strategy.

#### **2 RECOMMENDATIONS**

- 2.1 I recommend that Scottish Borders Council approves the Customer Strategy presented at Appendix 1.**

### **3 BACKGROUND- WHY WE NEED A NEW CUSTOMER STRATEGY**

- 3.1 The way in which customers interact and do business with public *and* private sector organisations of all kinds is changing rapidly, not least because of digital technology (for example online shopping and banking, travel booking, and catch-up television). SBC needs to ensure that it is responding to customers' changing expectations about when, where and how services can be accessed.
- 3.2 Ongoing public sector resource constraints and the increasing demand for services mean that SBC needs to encourage those customers who can "self-serve" to start using digital channels, allowing officers to focus on dealing compassionately and considerately with more vulnerable customers who may need support on a face to face basis.
- 3.3 Across the Scottish Borders, persistent areas of deprivation and poverty lead to real challenges for many individuals and families, complicated further by current welfare reforms. And as more people live longer, their needs in later life are likely to be more complex, requiring more flexible and adaptable help and support from SBC and its partners, personalised to their needs.
- 3.4 Maximising the benefits of the latest available technology will help SBC to improve the quality of online services, improve responsiveness, and save money that can be reinvested in care, education and infrastructure. Recent investment in ICT is now providing some of the solutions needed, including the Digital Customer Access (DCA) Project which will enable services and information to be accessible over the web on an anytime, anywhere basis and will enable flexibility and efficiencies across a large range of services.
- 3.5 However across a very large and varied organisation that delivers a vast range of services across a large rural, there are challenges in relation to:
  - encouraging customers to use online services (there are connectivity, access, and skills gaps in some areas, as well as other issues such as trust and motivation to use online services);
  - improving and streamlining business processes "behind the scenes";
  - breaking down service "silos" and encouraging a "one council" approach and culture;
  - rationalising and improving the property SBC operates from;
  - improving the accessibility of some services for those who have additional needs;
  - ensuring consistently excellent customer care across all services (and between service internally).
- 3.6 The Council's new Corporate Plan ([Our Plan, and your part in it](#)) promotes a new approach whereby SBC makes commitments and in return, customer and communities are asked to play their part. However, SBC believes that in order to keep its side of this "deal", it needs to continually enhance and improve the way services are designed (putting the customer at the heart of this), the ways in which customer can make contact, the feedback provided at key stages, and the level of customer care provided right across the organisation (when service both internal and external customers).

- 3.7 This new strategy for customers presented at **Appendix 1** (Our services for you: Scottish Borders Council's strategy for our customers 2018 -2023) will help us make the most of technology as well as consider the role of staff in relation to designing and delivering services that put customers at the heart of what is delivered. It presents:
- SBC's vision for the future
  - SBC's customers
  - Current approaches to serving customers and designing services for customers
  - The new approach proposed
  - Measure and demonstrating success
- 3.8 By implementing the high level actions identified within this strategy, SBC can achieve its aspiration which is to *"improve outcomes and quality of life for those who use our services, and keep the Scottish Borders thriving"*.

#### 4 OUR VISION FOR THE FUTURE

- 4.1 Within the Strategy, a clear, strong vision for the future is presented under five themes, and a summary is provided below:
- (i) The future will be **"digital by design" and fully utilise digital technology where it can improve services**- improved online services, personalised where appropriate, provision of feedback, automation of some processes, and increased digital skills for staff and communities;
  - (ii) The future will **be less about where services are delivered from, and more about improving outcomes and access for customers**- customer service staff who work flexibly and agilely across a variety of locations, outreach for face to face meetings, community hubs and mobile working, and fully accessible services for those who require additional assistance e.g. British Sign Languages users;
  - (iii) The future will be **"joined up" for us and for you** - technology will enable one way into SBC, and allow customer details to be provided once, and will facilitate easy movement between services;
  - (iv) The future will **prioritise customer care, dignity and respect across SBC**- provision of excellent customer service for everyone through comprehensive customer care training, up-skilled staff to focus on more vulnerable customers, taking advantage of training and support e.g. around mental health and dementia;
  - (v) The future will **involve our customers**- involvement in service design, through Area Partnerships and People's Panels, and an enhanced complaints handling procedure.

#### 5 DELIVERING THIS STRATEGY

- 5.1 Under each of the five themes within our vision for the future, we have defined a set of high level actions that are required to ensure that we work effectively towards this vision. These include:

- Using our Digital Customer Access project to move all appropriate services online, providing 24/7 flexible access for customer, tailored to the needs of the customer
  - Promoting, encouraging and supporting the use of digital services across all services, building the digital skills of staff and customers
  - Co-ordination of access to translation and interpretation services as well as support for users of British Sign Language (provided by "Contact Scotland-BSL")
  - Roll out of our Customer Care training to every member of staff, so that everyone understands the part they have to play in improving quality of life and keeping the Borders thriving
  - Working with Third Sector partners to deliver training around how best our frontline staff can support people with more complex needs such as mental health issues and dementia.
  - Developing our "locality" approach so communities and partners help us shape the services that are provided in towns and villages
- 5.2 As well as delivering all the actions contained within the strategy (Section 6 of Appendix 1), it will be important that SBC looks at success from the perspective of the customer. Over the next few years, SBC will work towards ensuring that customers can say the following:
- ✓ *"It was easy for me to access services"*
  - ✓ *"I feel like you know me as a customer"*
  - ✓ *"You respect me and treat me with dignity"*
  - ✓ *"You inform me"*
  - ✓ *"You listen to me"*
  - ✓ *"You involve me"*
- 5.3 Currently, SBC knows how many people call and visit its Customer Advice and Support Service. It is anticipated that, as the Digital Customer Access (DCA) project is implemented, there will be a reduction in calls and face to face contact. This, along with a range of measures including use of social media, sign-ups and log-ins to the new DCA "My Scot Borders" account feature, and customer satisfaction measurement (using a variety of tools included the Household Survey and People's Panel) will be used to measure and demonstrate success.
- 5.4 SBC's Digital Customer Steering Group (DCSG) has developed the Customer Strategy as part of the wider SBC's Digital Transformation programme. The DCSG, with membership from across SBC services, will now develop a detailed action plan and performance measures to support delivery, and will report to the Corporate Management Team on a quarterly basis, as well as SBC's Executive Committee.

## **6 IMPLICATIONS**

### **6.1 Financial**

There are no costs attached to any of the recommendations contained in this report.

## 6.2 Risk and Mitigations

- (a) There is a risk that some staff don't have the digital skills that are required to maximise the benefits of digital investment, especially amongst manual workers and those without every day access to IT equipment. SBC's Digital Customer Steering Group has instigated a series of engagement events during August and September in a variety of depots, care homes etc. to assess skills and to then design further training to address identified need.
- (b) There is a risk that SBC fails to get the necessary culture change amongst staff in relation to delivering the vision within the Customer Strategy. As well as the engagement events outlined above, a new staff eMagazine has been launched to enhance staff communications (and can be accessed through the SBC website on any device), Corporate Management Team is now holding regular meetings "out and about" to provide staff in localities with the opportunity to come and meet Senior Managers, and Customer Care training will be rolled out to every member of staff. The Digital Customer Steering Group will be responsible for developing a detailed action plan that helps deliver the vision within the strategy, including the necessary culture change.
- (c) There is a risk that there are customers who will not have the digital skills, connectivity/access, trust and motivation required to use online services. The strategy, although based on "digital by design" principles, will enable a multi-channel approach, ensuring that a variety of ways to contact SBC still exist, including face to face contact for those who need it. The DCSG undertook survey work during 17/18 to establish community use of and attitudes to digital services. The Group is currently looking at availability of public Wi-Fi and IT access, as well as how digital training might best be delivered with partners in areas where need has been identified.
- (d) A number of other risks exist in relation to the delivery of digital technology and have been identified as part of SBC's Digital Transformation programme and managed following the Corporate Risk Management framework. These risks are reviewed on a regular basis by the SBC Digital Transformation Board.

## 6.3 Equalities

An Equalities Impact Assessment has been carried out on this proposal and it is anticipated that there are no adverse equality implications.

## 6.4 Acting Sustainably

There are no adverse effects economically, socially or environmentally.

## 6.5 Carbon Management

There are no effects on carbon emissions.

## 6.6 Rural Proofing

This strategy aims to provide improved equality of access to services across all areas by using digital technology where possible, and exploring the use of outreach community hubs and mobile working.

## 6.7 Changes to Scheme of Administration or Scheme of Delegation

There are no changes to be made.

## 7 CONSULTATION

- 7.1 The Chief Financial Officer, the Monitoring Officer, the Chief Legal Officer, the Chief Officer Audit and Risk, the Service Director HR, and the Clerk to the Council have been consulted and comments received have been incorporated into this report.
- 7.2 Work is being undertaken with Corporate Communications to develop both internal and external communication plans around the strategy.

### Approved by

**Jenni Craig**

**Service Director Customer & Communities Signature .....**

**Author(s)**

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**Background Papers:** None

**Previous Minute Reference:** None

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