



# Customer Strategy

## 2024-2028



## Foreword

I am very pleased to support the publication of this strategy as part of the Council's ongoing transformation programme "Future New Forest, transforming tomorrow, together" where we will have committed to "investing in our people and services to meet customer needs". Customer is one of the four 4 themes that underpins the Transformation strategy, and will support and compliment other key strategies, such as digital and tenant engagement, to ensure the customer is at the heart of what we do.

This strategy sets out the Council's vision and commitment to achieve the best possible experience for our customers, whoever they are (residents, businesses, or partners) and whenever they deal with us. This strategy sets out our plan to achieve this by implementing 4 key principles:

- creating a culture of putting customers at the heart of what we do
- ensuring customers receive a consistent experience when interacting with us
- utilising technology and embedding a digital by design culture across the Council
- use the data we hold to provide a better customer experience

Through consultation we recognise that many of our customers want a more immediate, personalised service and expect to be able to contact us when it is convenient for them. I am keen to ensure all customer channels, including digital, telephone and face-to-face, enhance the customer experience and are available to support our vulnerable customers. Equally our changes will aim to reduce avoidable contact and provide opportunities for greater customer feedback, whilst our capacity to reflect and respond to this will be built into our services to improve them. We will ensure our customers can interact with us easily, effectively, and when convenient, and we will manage expectations. A new set of customer standards will ensure a consistent experience from services across the council, and we will regularly monitor and review feedback and performance against them.

We want to ensure the customer receives a professional and modern experience when interacting with us and I am proud of how this strategy supports this aim.

**Cllr Jill Cleary**

Leader, New Forest District Council



## Introduction

This strategy sets out the Council's plan for delivering our services to customers across multiple teams and communication channels.

We have recognised that our view of customers is not always joined up and that customers can be a customer of more than one service across the Council. We will transform how we work and deliver our services, focussing on understanding and examining our customers' experience, expectations to improve choices, our systems, and processes.

We must develop more cost-effective ways for our customers to interact with us, and support customers to self-help wherever possible by embracing technological solutions.

Therefore, we will ensure that:

- our customers have easy access to information
- we reduce demand through design of our services,
- we have the right skills and capacity to support complex or vulnerable customers
- we embed a positive customer focussed culture meeting agreed standards of service across the Council

The need for us to provide an effective and efficient customer experience is important to help us meet increasing demand for services, tackle complex problems and work within our resource levels. Our ambition is to get things right first time, every time, and deliver high quality, value for money services organised around our customers needs.

In delivering this Customer Strategy we aim to raise the profile of the customer throughout the organisation and ensure that our plans, decisions, actions, and culture, are customer focused. Customers will benefit from the delivery of this strategy as they will be able to give feedback, be listened to, have assurance, and have services designed to meet their needs. This will ensure we understand our customers, build trust, deliver services that are accessible and provide a consistent professional customer experience in a culture where we strive to continually improve the customer experience.



## Our customers

### Who are our customers?

We have 83,077 households and 7,900 businesses across the district, and a population of 175,778 residents, which is expected to increase to 182,800 by 2029.

The Council is the landlord to 5,200 tenants.

45% of our residents are economically inactive.

55.2% of our residents are of employable age.

29.4% of residents are aged over 65.

93% of residents access the internet (source: Residents Survey 2022).

3.6% of the population is aged 85 and above, this is forecast to be 6% in 2029.

28% of the population live in rural areas.

4 out of 114 neighbourhoods across the New Forest are in the top 20% most deprived neighbourhoods for income deprivation in England (2019 Index of Multiple Deprivation).

### Customer experience in numbers

Delivering services to local residents and businesses, enabling them to report and request services, dealing with enquiries across all service channels and enabling residents to access information, is a significant part of our core purpose.

### During 2022 and 2023

The following information about customer interactions gives just a flavour of the volume of interactions handled by our teams during 2022/23.

Number of phone calls - 151,801 from our Housing, Revenues and Benefits and Customer Services.

3,612 webchats and 102,063 emails to general inbox of highest customer contact teams and our website had over 1.1 million page views

There were 34,141 in person visits to our Information Offices.

The Council operates 4 Information Offices located in Hythe, Lymington, Lyndhurst and New Milton, and work in partnership with 4 town and parishes in Fawley, Fordingbridge, Ringwood, and Totton, to deliver in person customer services and support.

90% of customer interactions currently arrives via phone or email, even if an online form is used (Source: analysis of customer contacts 2023)

Our data tells us we have different types of customer enquiries for council services, and these can be summarised as follows:

- initial access. For example, reporting, paying, applying, or enquiring.
- repeat access (avoidable contact). For example, following up.
- mistaken access. For example, non-council services.
- ongoing interactions. For example, visits and inspections.



## Our challenges

New Forest District Council (NFDC) has an ambitious Corporate Plan for 2024 to 2028 to meet the needs of local residents and businesses. We will be delivering this plan in the context of a rapidly changing world, and to support this we are delivering a transformation strategy.

To deliver the outcomes of the corporate plan, we are going to need to change as an organisation, responding to four key challenges identified in the transformation strategy which will impact every aspect of our operation. How we will interact with our customers is one of the objectives of the transformation strategy. We need to develop more cost-effective ways for our customers to contact us. We need to manage demand for our services, supporting customers to self-help and embrace technology, whilst recognising some customers will need support, and to improve the customer experience.

### 1. Modernising services

We will need to focus on customer needs and outcomes when redesigning services and seek feedback to improve. Our systems and processes need to keep pace with the advancing digital technologies and the impact these are having on people's lives and expectations.

There is growing demand for digital access to council services, accompanied by a high level of access to the internet and growing capability among our residents. We need to improve the customer experience by joining up our data and systems. We need to make it easier for customers to find the services they need and be able to connect with us at a time and place they choose.

### 2. Financial constraints

Rising costs of service delivery combined with new challenges and burdens means we are facing potentially significant budget deficits over the next four years. We must continue to find ways to reduce the cost of delivery and we must embed financial responsibility into all that we do. We will need to reduce service costs through redesign and encourage adoption of lower costs channels without impacting service quality.

### 3. Capacity and capability

The world is changing fast with the rapid growth of technology and artificial intelligence (AI). We need to develop new skills to respond to the opportunities and challenges we face. However, most councils are facing recruitment and retention problems. We need to identify and release capacity from parts of the organisation through greater use of technology to enable increased focus on our priorities. We need to develop a more agile workforce to respond to a changing local government landscape and a digital world without leaving our vulnerable customers behind.

### 4. Climate and sustainability

Meeting national and local targets to reduce emissions and support nature will require us to change the way we use resources and deliver services. We declared a Climate Change and Nature Emergency in 2021 and are committed to reducing emissions to reach net zero and supporting nature recovery. We must work in partnership with residents, businesses, and other public services to make a real impact. These changes will affect all aspects of council operations, and we will need to design services to be delivered in ways that promote positive environmental impacts.

## Opportunities for change

We have undertaken extensive customer research to find out the views of our customers. This can be summarised as:

### Connecting services

- Services are not always joined up
  - » Customers said they have to provide the same information to different teams
  - » 29% of telephone calls are transferred
  - » Customers are not always able to give feedback

### A consistent customer experience

- There can be different customer experiences depending on which service you are accessing
  - » Customers said that they did not always get an acknowledgement or assurance on timescales
  - » 33% of emails received were follow up enquiries chasing the original enquiry

### Increasing online capabilities

- Some customers want to be able to do more online
  - » 84% of customers from our web survey said it was easy to find information on our website
  - » 47% of customers said they could not find what they were looking for online, or do what they needed to do online
  - » 66% of customers want an online account where they can do things for themselves
  - » 74% of customers want to be able to upload documents online
  - » 71% of customers want easier forms to fill in

### Increasing online capabilities

- We do not always utilise all the data we hold
  - » We hold lots of data and do not always use this to help design services

We are mindful that there are 10% of our customers who are not comfortable using online services and 7% of our population have no access to the internet. This strategy is clear in that we will continue to support our vulnerable customers.

### Customer feedback 2023

"Provides an excellent service over the phone"

"Issues are usually resolved quickly when calling up the council"

"We don't like being passed around when we call"

"Human contact gives us confidence. We want to know it'll be done"



## Customer outcomes

From reviewing customer feedback and the customer research we undertook, we have identified 4 key organisational outcomes that we will embed into our culture across the council as part of this customer strategy. This will underpin what we do and will ensure that customers have a professional experience when interacting with us.

In delivering our services we will understand our customers, provide a consistent and professional experience, enable customers to contact us in different ways and be trusted.

### 1. Understand

We will understand our customers and communities: who they are, what they need and their priorities and why they have contacted us. We will talk to them, listen to their feedback, and we will act on it where possible. We will create opportunities to engage with our customers. We will use customer data and insight to plan our services.

### 2. Experience

We will provide an efficient and professional customer experience. We will automate tasks where this can improve communication with customers and speed up outcomes. We will connect teams and share information so that customers do not have to repeat themselves. We will use feedback to continuously improve our customers' experience.

### 3. Access

Customers will be able to contact us in a range of different ways, according to their needs, including by phone and face to face. We will ask customers about how they need to be contacted and respect those needs whenever we can. We will invest in technology to make it possible for customers to access all services online, on any device, at any time.

### 4. Trust

Our customers will trust us to act on their requests and have confidence however they contact us. Customers will be able to track and check the status of their requests. We will always be fair and honest. We will keep data secure and use it for the benefit of customers, and we will have a reputation as a professional and efficient organisation.



## Our customer promise

Our Customer Promise defines the way that all of our staff across the council will deal with our customers, whether they are residents, businesses, partners, or suppliers. Our Customer Promise will help us to deliver our outcomes of understand, experience, access and trust.

### Listen and learn

To understand we will listen and learn by:

- actively seeking your feedback to improve services
- monitoring customer demand to identify what we can do differently and respond accordingly
- making it simple for you to tell us if we get something wrong and follow up with you where required
- providing you with opportunities to be involved in shaping our services

### Positive experience

To ensure you have a positive experience we will be clear with you by:

- doing things when we say we will
- working towards making our website accessible to everyone
- providing information that is clear and easy to understand
- providing clear guidance on different ways you can contact us

### Fair treatment

To ensure access we will be open, honest and respectful by:

- treating you fairly and with respect
- being understanding, approachable, open and honest
- providing a professional service
- updating you on progress so you know what is happening next and by when

### Taking responsibility

To build trust we will take responsibility by:

- taking ownership for resolving your problem with you
- actively seeking to resolve customer concerns
- setting clear expectations about our services
- working together to get the best outcome

### A respectful environment

We would like you to:

- treat us with respect and courtesy
- tell us what you think about our services
- use our website and online services to access services and information you need if you can
- sign up to resident emails if able to do so
- provide information we request in time
- tell us when something changes





## Our 4 principles

Our Customer Outcomes and Promise will shape how we provide services to meet customer needs.

Our whole organisation approach will ensure we embed consistent behaviours, measure performance, and constantly review our services. We will design our services with our outcomes in mind to meet the needs of customers and make the best use of technology. This will help us meet our challenges, reduce the cost of delivering services and allow us to focus even more on supporting customers with complex needs.

Central to our principles is that the customer will have a positive experience wherever, and however, they interact with us. Our four principles will have our outcomes at their core, these are:

### Principle 1

Understand: we will put customers at the heart of what we do.

### Principle 2

Experience: we will provide our customers with a consistent experience through all interactions with us.

### Principle 3

Access: we will utilise technology to meet our customer's needs.

### Principle 4

Trust: we will use data to shape and improve service delivery.



## Principle 1

We will put the customer at the heart of what we do.

We will consider what is important to our customers and take a whole organisation approach to bring services together so that we join up services. We aim to reduce avoidable contact, use our resources effectively and ensure our customers receive a good experience, by reviewing our processes and designing services to meet our customer needs and delivering first time resolution. We will ask for feedback to tell us how we are doing, and we will make improvements where appropriate. This will ensure we understand our customers.

To ensure we understand our customer we will:

- review and redesign services to meet customer needs
- understand and address the causes of avoidable contact
- actively listen to our customers and enable customers to give feedback
- work with partners to support our customers
- ensure access to our services are inclusive
- learn when we get it wrong and have a clear and transparent complaints procedure with a feedback loop to improve services and ensure lessons are learned
- embed positive staff behaviours at all levels across the Council
- set up a resident customer focus groups to hear their views
- ensure council policies are customer focussed

## How will this be measured

### Measure 1:

Devise a customer service training programme and deliver refresher training every 2 years.

Target: All staff dealing with customers

Timescale: End of year 1

### Measure 2:

New starters to undertake customer service training as part of their corporate induction.

Target: 100%

Timescale: End of year 1

### Measure 3:

Monitor complaint trends to ensure improvements have been embedded and problems not recurring.

Target: 100% of all complaints

Timescale: End of year 1

### Measure 4:

Reduce face to face visits for payments.

Target: By 20%

Timescale: End of year 2

### Measure 5:

Develop a customer focus group.

Target: To hold 2 meetings a year

Timescale: End of year 2

### Measure 6:

Number of key customer interactions reviewed to understand the customer journey.

Target: To review the 10 highest customer interactions

Timescale: Year 2



## Principle 2

We will provide our customers with a consistent experience through all interactions with us.

We want to make interacting with us easy and effective and our teams work together to give customers an easy, convenient, and joined-up experience, with assurances given so customers do not need to follow up with further contact. We join up information and train staff so that you do not have to give us the same information multiple times. Our aim is to achieve excellent customer service and provide customers with a consistent experience.

To ensure we provide a professional experience we will:

- have clear processes so customers understand how to contact us and understand what to expect
- keep customers informed and provide assurance and timescales
- take responsibility and aim to get a first-time resolution.
- adopt an “every contact counts” approach, adding value to every contact
- set up a Council wide Customer Focus Group to share ideas and good practice
- train staff with key skill which are logged on our Learning Management System (LMS)
- review how phone call calls are answered to free up resources to focus on other tasks
- work with town and parishes to understand and support our customers
- promote and embed our Customer Promise and standards
- standardise processes involving customers and bring these together where similar

### How will this be measured

#### Measure 1:

Reduce phone calls and call transfers.

Target: 10% reduction

Timescale: End of year 2

#### Measure 2:

Customer satisfaction surveys.

Target: To confirm once systems in place and baseline agreed

Timescale: End of year 2

#### Measure 3:

Staff complete training on our LMS.

Target: 100%

Timescale: End of year 2

#### Measure 4:

Quality assessments through sampling of calls for high customer contact services.

Target: To be agreed once baseline confirmed

Timescale: End of year 2

## Principle 3

We will utilise technology to meet our customer's needs.

We make better use of technology to provide modern and efficient services to our customers and opportunities for them to do things for themselves and "self-serve." We help customers use our website and provide alternative methods for access for those who are not able to. This will ensure customers can access our services.

To ensure customers can access our services we will:

- increase online services so that customers can do things for themselves
- simplify processes and automate where possible
- enable customers to interact and access services digitally at a time that suits them
- enable customers to provide information once
- implement a new Customer Records Management system
- review our wider technology such as phone, Webchat, and email management
- ensure our webpages are accessible, up-to-date and easy to read on all devices
- reduce our paper usage wherever possible
- have information available for staff to deal with customer queries
- have devices so work can be done in the right place, right time, and the most efficient way
- work with partner organisations to build digital skills
- have digital champions who will work with staff to educate and promote digital activities

### How will this be measured

#### Measure 1:

Increase digital payments.

Target: TBC

Timescale: End of year 1

#### Measure 2:

Ensure website is accessible 24/7.

Target: 100%

Timescale: End of year 1

#### Measure 3:

Reduce use of paper to shift interactions to digital methods for high transactions.

Target: To be agreed once baseline confirmed

Timescale: End of year 2

#### Measure 4:

Increase online forms and self-services for high customer contact and key transactions.

Target: TBC

Timescale: End of year 2

#### Measure 5:

Reduce number of cheque payments.

Target: 50%, Timescale: End of year 2

Target: 100%, Timescale: End of year 3



## Principle 4

We will use data to shape and improve service delivery.

We keep data secure, accurate, and compliant and only ask for information that we need. We research and analyse data to understand and to help make decisions about services. We will join up the data we hold across different services to provide a positive experience for the customer and aim to create a "golden record" of our customers so we can see all their data and avoid having to repeat providing information. This will ensure customers trust the council.

To ensure customers can trust our services we will:

- hold council wide data for staff to view when interacting with customers
- provide services using data and insight to ensure that we meet customer needs
- ensure our records are stored securely, are accurate and up to date
- provide a simplified customer experience
- improve data analysis and use it inform decisions with the customer in mind
- monitor performance data to inform and support decision making and responses
- join up our view of data to provide better customer service and better understand needs
- review and redesign customer journeys across all channels

- use data to size our services according to need and demand

### How will this be measured

#### Measure 1:

Up to date data retention policies and compliance.

Target: 100%

Timescale: End of year 1

#### Measure 2:

Number of interactions through a customer portal.

Target: To be confirmed once portal is available

Timescale: End of year 2



## Customer standards

We strive not only to meet customer expectations but to exceed them. To achieve our values and deliver our 4 principles to ensure our customers have a consistent experience, no matter which service they contact, we will implement the following customer standards:

We will:

- aim to deal with your request by the first person you contact for all non-complex contact
- aim to answer your call in 3 minutes
- acknowledge customer contact and give timescales for replying when not able to do so immediately
- give a name, department, and contact number to call back when leaving a message
- always communicate clearly and in plain language
- respond to enquiries and written communication within 10 working days
- embed corporate response standards when using email, letters, record taking, and voicemails
- have online services which are accessible 24//7
- adhere to our corporate style guide for communications
- acknowledge, clarify, and respond to complaints within published timescales

## Channel strategy

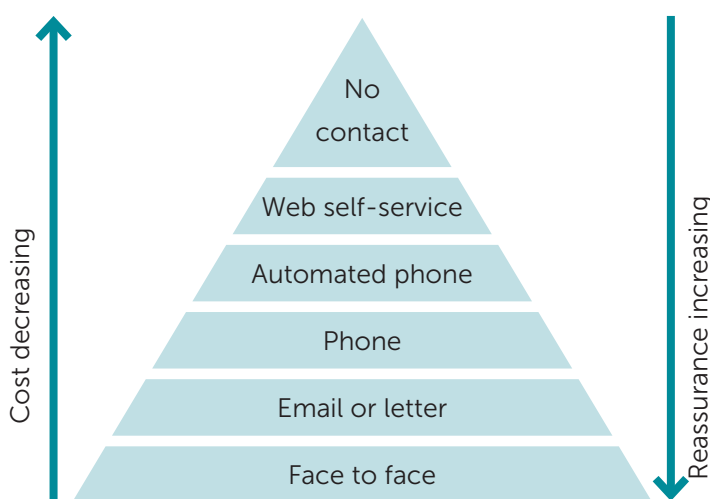
The channels through which public services are delivered and by which the public has contact with the Council, (for example by telephone, online, through social media, in person, or via other means), are an important part of how we provide our services, and there is an ongoing need for them to be managed effectively and efficiently for everyone. A channel strategy is an organisation's plan for the channels it will use to deliver services to, and interact with, its customers, and it explains how the council will meet the contact demands of its customers using the resources it has available and is not simply a plan to move service provision to online channels.

Research states that 99% of the UK is online and since the pandemic 65% of those have tried something new online, such as shopping or paying bills, and most (90%) have sustained this (Source: UK Consumer Digital Index 2022). We know that 93% of our residents have access to the internet (Residents survey 2022) and from our research we know our customers want to do more online, with access to easy-to-use forms, which are simple to complete, and at a time that suits them.

From our research we know customers like to contact the Council by telephone, as this gives assurance. However, we know that getting customers to do more online is cost effective and cheaper for the council, but assurance is needed. Providing access to services and being able to self-serve which is accessible and easy to use will mean customers can interact when convenient to them and avoid having to contact the council.

There is still the need for face to face and telephone contact and this is an important part

of our strategy to ensure we support vulnerable customers and that they are not excluded, our services will be inclusive and accessible. This may include using our offices to create hubs and have support available to customers where they can be supported.



This diagram shows how communication types that are high in reassurance will be high in cost, whilst types that are low in cost will be low in reassurance.

The channel strategy is part of the wider customer strategy and describes how the vision, outcomes and objectives of the customer strategy will affect how customers can contact the council in the future. There will be a mix of access channels, giving the customer choice, which are accessible, well managed and designed and customer experiences will be reviewed to improve access and customer journeys.



## Our key channel strategy principles

### **Digital by design**

We will provide a choice of contact channels, including telephone, for all our services.

We will prioritise development of digital channels for high demand, low complexity services, and services with high levels of avoidable demand.

### **Easy to access**

We will simplify how customers contact us by providing one primary customer portal and minimising published phone numbers.

We will ensure our services are accessible and do not exclude those with disabilities or additional needs, for example translation services.

### **Meet customer needs**

We will direct customers to the channels most likely to meet their needs.

We will prioritise telephone and face-to-face for customers who cannot use digital channels, have complex needs, or where these channels can help prevent future demand.

### **Keep customers informed**

We will use digital channels to proactively update customers about cases they have raised and issues affecting their neighbourhoods, to reduce the need to contact and chase us.

We will keep all case-related information and updates between staff against their case, to provide them with the latest updates.

### **Minimise email and post**

We will minimise the use of email and post as a channel for new requests and providing documents by utilising and encouraging use of digital channels.

### **Digital payments**

We will prioritise digital channels for payments unless specific exemption criteria are met.





## Key tasks

This strategy is ambitious and central to achieving our aims and meeting our future challenges. As we embark on our transformation journey, the four customer outcomes and principles will be applied to all transformational activity to ensure they support the objectives. We will embed this strategy over 4 years and there are several key tasks to undertake to provide the foundations to implementing.

Each part of this journey needs to be assessed to ensure it meets our aims, resources are planned, and it is responsive to changing technology and evolving customer expectations and needs. To understand and develop this strategy there are some key tasks aligned to our transformation strategy that need to be undertaken, these are:

### Year 1:

Define a core set of digital capabilities and devices to support service redesign

Identify opportunities to streamline and automate business processes

Align the Digital Strategy and road map

Review the activity analysis of high transactional services

Review action plans identified from research

Scope and procure digital solutions, including a Customer Relationship Management (CRM) system, that supports our digital by design approach

### Year 2:

Service and process redesigns

Identify data sets to monitor performance and provide real time information

Review standards are embedded

Develop and embed CRM solution and customer focused digital solutions

Embed customer feedback

### Year 3:

Review corporate standards

Align Digital Strategy and review

### Measure 4:

Review strategy

# Annexe 1

## Action plan

Whilst working through the key activities there are still actions which can be undertaken to embed this customer strategy over the next two years, which we will continually review. There are summarised as:

### Principle 1

We will put customers at the heart of what we do.

#### Actions:

Year 1: Establish a residents Focus Group

Year 1: To review how customers can give their feedback

Year 1: Understand and address the causes of avoidable contact in high customer contact services

Year 2: Review the induction programme for new starters

Year 2: Devise a customer service training programme which is undertaken every 2 years

Year 2: Develop feedback channels for customers

### Principle 2

We will provide our customers with a consistent experience through all interactions with us.

#### Actions:

Year 1: Launch customer standards and staff to attend awareness sessions

Year 1: Establish a council wide Customer Focus Group

Year 1: Launch Customer Promise

Year 1: Review Service Level Agreements with Town and Parishes

Year 2: Adopt a "make every contact count" approach

Year 2: Sample check to ensure customer standards adhered to

Year 2: Liaise with key partners for feedback on customer experience

### Principle 3

We will utilise technology to meet customer needs.

#### Actions:

Year 1: Scope and procure CRM and consider wider customer access channels

Year 1: Review use of paper to shift to digital

Year 2: Review website to ensure it is accessible

Year 2: Review our online forms

Year 2: Provide real-time information on key performance indicators

Year 2: Review CRM and access channels to ensure meeting specifications

### Principle 4

We will use data to share and improve service delivery.

#### Actions:

Year 1: Identify datasets that help us to understand customers and demand

Year 2: Join up data to avoid customers having to duplicate information

Year 2: End to end mapping of high customer contact journeys