

## **Select Committee Task and Finish Group Scoping Document - Customer Experience Transformation**

The process for establishing a task and finish group is:

- 1. The Select Committee identifies a potential topic for a task and finish group.**  
This topic was agreed as part of a discussion on the Transformation Programme Update discussion held by the Select Committee on 18 October 2019.
- 2. The Select Committee Chairman and the Scrutiny Officer complete the scoping template.**  
Completed before the Resources and Performance Select Committee meeting on 16 December 2019.
- 3. The relevant Council Overview and Scrutiny Committee reviews and agrees the scoping document.**  
Reviewed and agreed by the Resources and Performance Select Committee on 16 December 2019.
- 4. The Select Committee agrees membership of the task and finish group.**  
Membership of the task and finish group discussed on 16 December 2019. Members: Chris Townsend, Nick Harrison, Will Forster, Bob Gardner and Richard Walsh.
- 5. The task and finish group meet to agree work allocation, final report and other deadlines and any other practical aspects relating to relevant actions – see Action Plan below, page 4 for detail.**  
First meeting held on 04 February 2020 to agree scope and work allocation as outlined below.

**Review Topic:** Customer Experience Transformation

**Select Committee:** [Resources & Performance](#)

**Relevant background:**

The council is undergoing a major programme of transformation and the Resources and Performance Select Committee has previously scrutinised specific programmes that sit within its remit. One of these programmes is Customer Experience, which has already delivered a range of capabilities and benefits.

The wider transformation programme is being refreshed and refocused to ensure that it is adaptable and continues to meet the council's evolving objectives and priorities. Customer experience is a critical element of this work given the links and dependencies it has with other programmes and it is therefore an appropriate time for Members to contribute their knowledge and perspectives in order to help shape the future direction of the programme and ensure that it supports the next phase of transformation.

Members agreed that the most effective means of doing this would be via a deep dive of the Customer Experience programme, using a creative and practical approach to scrutiny extending beyond formal committee meetings. A Task and Finish Group has been formed in order to achieve this.

**Why this is a scrutiny item?**

It is envisaged that Members will play a key role in the successful delivery of the Customer Experience programme by becoming champions for this work. There are a range of opportunities to explore around the concept of customer and Members will be able to provide valuable insights as to what residents want us to deliver.

**What questions are the task and finish group aiming to answer?**

- What do residents expect and value when they interact with the council as customers?
- How can both Members and Officers understand and develop the concept of Customer to improve insights into customer wants and needs?
- How can Members lead this work?
- How can we effectively link an improved customer journey with benefits to communities 'on the ground'?
- How can this work improve community capacity, capability and participation?
- What best practice or learning can we gather from other local authorities?

**Aim:**

The Task and Finish Group completes a deep dive review of the Customer Experience programme in order to support and champion its successful delivery going forwards.

**Objectives:**

1. To understand and quantify the work on Customer that has been completed as part of the transformation programme to date and the impact it has had on residents, staff and the wider organisation.
2. To help shape and define the future direction and priorities of the Customer Experience programme.
3. To ensure that work both being designed and delivered supports an overarching ambition that we are providing what matters to residents and creating an enhanced customer experience.
4. To consider the role of Members and approach to scrutiny in this and other transformation programmes.
5. To understand the Resident Survey Methodology, results and targets.

**Scope and approach to the work:**

The Task Group's remit will be related to work streams within the Customer Experience programme. As the programme moves into a new phase as part of the transformation refresh it is the intention that Members provide support and insight to ensure that it delivers what residents want and need.

Regular operational activity and the day to day running of the service will not be in the scope of the review.

It is envisaged that Members will be supported to use a wide range of tools and approaches to deliver this work, including:

- Site visits.
- Evidence gathering from other authorities.
- Feeding-in their knowledge of residents' views, perceptions and expectations.
- Hands-on testing of new portals, systems and processes.
- Interaction with service staff to better understand the service, its outputs and current pressures (e.g. use of Children's' Single Point of Access).
- Incorporation of the Resident Survey (methodology, results, targets) as appropriate.

**Outcomes for SCC / Benefits**

- Clearer understanding and definition of the concept of Customer.
- Improved insights into customer demands and expectations.
- Supporting achievement of the Community Vision's strategic principles, including enabling people to 'help themselves and each other' and 'get the information they need at the right time and place'.
- Improved perceptions and feedback of customer interactions as a result of new approaches and systems.
- Effective demand management by redirecting residents to self-help resources.
- More cost-effective and efficient means of communication and service delivery.
- Positive changes to residents' behaviour – i.e. greater use of the council website, online and automated systems and reduced reliance on direct contact.
- Supporting delivery of the wider transformation programme's ambitions, including those related to agile, digital and moving closer to residents.
- Potential to achieve financial savings as a result of the above.

**Proposed work plan:**

It is important to outline work-strands and clearly allocate who is responsible for the work, to ensure that Members and officers can plan the resources needed to support the task group.

Timescale	Tasks	Responsible
February	<ul style="list-style-type: none"> <li>• Review the work done to date through various work-streams to transform customer experience and understand the impact of this work.</li> <li>• Finalise programme for the Councillor visit on 6 March.</li> <li>• Develop key lines of enquiry.</li> <li>• Survey of elected members to feed in their knowledge of resident's views, perceptions and expectations.</li> <li>• Background information pack sent to Task &amp; Finish Group to set context and provide essential information about the service / transformation programme aims – See links in this document under heading “Useful Documents.”</li> <li>• Presentation on the <i>Resident Survey</i> followed by discussion. Presentation should cover how other Councils do resident surveys. <b>See Annex 1.</b></li> </ul>	<p>Councillors / Programme Managers / Clive Mentzel.</p> <p>Clive/Sarah.</p> <p>Task &amp; Finish Group.</p> <p>Heather Chapman, Clive Mentzel. Task &amp; Finish Group.</p> <p>Susan Grizzelle / Sarah Bogunovic / Louise Halloway / Carpinello Petruzzello / Clive Mentzel.</p> <p>Nicola Kilvington/Rich Stockley.</p>

Timescale	Tasks	Responsible
<p><b>March</b></p> <p><b>6 March 2020, 10:00 to 16:00</b></p>	<p>Customer Services Site Visit</p> <ul style="list-style-type: none"> <li>• Site-specific preparatory/background information sent to Councillor Task and Finish Group in advance – see links below in this document under heading “Useful Documents.”</li> <li>• Initial introduction: Setting the overall scene for the Task &amp; Finish Group. This introductory session also to include fleshing out and presenting more detail on the document included in the papers for Full Council relating to the transformation programme and the customer services section within it. In addition, Cllrs would like a summary of how the 11 Boroughs in the County approach Customer Service.</li> <li>• Subsequent to introduction, office tour and meetings with a specific focus on Request for Support Team, Adult Social Care (MASH and Portal work), Highways and Web.</li> <li>• Testing / Demos of new online Highways Journeys and Adult Social Care Portal - showing the 'before' and 'after' experience.</li> <li>• Webchat testing.</li> <li>• Interviews with key service contacts to understand value and impact of Single Front Door model.</li> <li>• Survey - Customer experience and expectations when contacting the council.</li> <li>• User Testing Session - members to attend session with residents.</li> </ul>	<p>Susan Grizzelle / Sarah Bogunovic / Tom Pooley / Clive Mentzel.</p> <p>Susan Grizzelle / Sarah Bogunovic / Louise Halloway.</p> <p>Claire Thomas / Rachel Bearman / Rik Jackson.</p> <p>Rachel Bearman.</p> <p>Rachel Bearman.</p> <p>Carole Comfort.</p> <p>Heather Chapman.</p> <p>Rik Jackson / Heather Chapman.</p>

Timescale	Tasks	Responsible
<p>Date to be determined.</p> <p><b>Mid/Late March</b></p>	<ul style="list-style-type: none"> <li>• Play-back session from Customer Service Centre visit and evidence gathering.</li> </ul> <p><u>External Benchmarking:</u></p> <ul style="list-style-type: none"> <li>• Learning from other Local Authorities - interviews, site visits and evidence gathering – Set up visits/meetings.</li> </ul> <ul style="list-style-type: none"> <li>• Analysis of Councillor Survey.</li> </ul>	<p>Task and Finish Group / Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Tom Pooley / Clive Mentzel.</p> <p>Task &amp; Finish Group / Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Sarah Bogunovic / Clive Mentzel.</p> <p>Clive Mentzel/Heather Chapman.</p>
<p><b>April</b></p> <p><b>14 April</b></p>	<p><u>External Benchmarking:</u></p> <ul style="list-style-type: none"> <li>• Learning from other Local Authorities - interviews, site visits and evidence gathering.</li> <li>• Play-back session from visits and evidence gathering.</li> <li>• Collate and review findings from research and experience.</li> <li>• Prepare task group progress update report for Select Committee meeting on 23 April; deadline for this is 14 April.</li> </ul>	<p>Task &amp; Finish Group supported by Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Tom Pooley / Clive Mentzel.</p>

Timescale	Tasks	Responsible
<b>May</b>	<ul style="list-style-type: none"> <li>• Finalise learning from other Local Authorities - interviews, site visits and evidence gathering.</li> <li>• Play-back session from visits and evidence gathering.</li> <li>• Collate and review findings from research and experience.</li> </ul>	Task & Finish Group / Scrutiny Officer.
<b>June</b>  <b>11 June</b>  <b>22 June</b>	<p>Draft and finalise task and finish group report.</p> <ul style="list-style-type: none"> <li>• Agree Draft for Chairman’s draft report meeting.</li> <li>• Deadline to finalise report.</li> </ul>	
<b>1 July 2020</b>	<ul style="list-style-type: none"> <li>• Discussion/agreement of report at Select Committee meeting and transmission of recommendations to Cabinet.</li> </ul>	Task & Finish Group.

**Witnesses**

[Cabinet Member for Corporate Support](#)

[Cabinet Member for Children, Young People and Families](#)

[Cabinet Member for Adults and Public Health](#)

Executive Director – Transformation, Partnerships and Prosperity

Director – Transformation

Transformation Programme Managers

Customer Services Group Manager

Customer Relations and Service Improvement Manager

Relevant Service Directors in Children’s, Adults and Highways

Neighbouring Local Authority Cabinet Members and Officers

Residents/customers

## Useful Documents

**Surrey County Council** (Annexes refer to documents as published, not documents attached to this Plan except for Annex 1):

- Customer Experience transformation programme business case (Annex A).
- Transformation Programme update to Resources & Performance Select Committee on 18 October 2019 (Annex B).
- Community Vision for Surrey 2030 (Annex C).
- Equalities Impact Assessment published 21 January 2019 (Annex D).
- Customer Services Service Plan (Annex F).
- [Minutes](#) of the Resources and Performance Select Committee meeting on 16 December 2019 (Annex 1).
- Surrey Residents Survey (Needs refreshing, is dated).
- Who are our customers? [Surreyi.gov.uk](http://Surreyi.gov.uk).
- Surrey Joint Strategic Needs Assessment.

## Other Authorities:

See **Table A** below.

## Additional Resources:

Customer Service Excellence: <https://www.customerserviceexcellence.uk.com>

The Institute of Customer Excellence: <https://www.instituteofcustomerservice.com>

## Potential barriers to success:

- Availability of relevant Members, Officers, benchmarking local authorities and other key stakeholders.
- Member awareness/visibility of the programme's role in the wider transformation programme (i.e. understanding of interdependencies etc.).
- Engagement with, and capacity for, site visits and testing of new processes.
- Resource within the service to facilitate/support Member evidence gathering.
- Willingness/availability of external partners to participate in this work.
- Customer Services heavily engaged with logistics of the office move during period of review.

**Equalities implications:**

The Task Group recognises that there are numerous considerations around equalities when conducting its work, and that there are many people with various needs that will be part of this process. It will be mindful of how it conducts its work in order to ensure people are provided the opportunity to contribute, and that any barriers to doing so are mitigated. It will also conduct its work mindful of the requirements of the Equalities Act 2010 and its prescriptions in relation to customers interacting with the Council.

Although there are no major equalities implications identified at the outset of this work, the Group will monitor any equalities implications emerging from its recommendations with officers and will work to identify mitigation measures for those with a potentially negative impact. The group will take into consideration the [Equality Impact Assessment on the Customer Experience](#) carried out as part of the wider transformation programme.

<b>Task Group Members:</b>	<a href="#">Chris Townsend</a> , <a href="#">Nick Harrison</a> , <a href="#">Will Forster</a> , <a href="#">Bob Gardner</a> and <a href="#">Richard Walsh</a> .
<b>Co-opted Members:</b>	None.
<b>Spokesman for the Group:</b>	Nick Harrison.
<b>Scrutiny Officer:</b>	Clive Mentzel / <a href="mailto:clive.mentzel@surreycc.gov.uk">clive.mentzel@surreycc.gov.uk</a>

**Table A: Local Authority Benchmarking as agreed by Councillors on 04 February 2020:**

<b>Local Authority:</b>	<b>Contact/s:</b>	<b>Method:</b>	<b>Date:</b>
Either West Sussex	Head of Customer Experience.	Skype	
Or East Sussex	Customer Services Manager	Skype	
Cornwall Council	Head of Customer Experience	Skype	
Local Surrey District and Borough Councils	Councillors felt one would suffice, either a District or a Borough.	Visit	
Hampshire	To be determined.	Skype	

Hertfordshire	To be determined.	Visit	
OneSource - the Orbis-equivalent for Havering, Newham and Bexley		TBD	

**Notes:**

1. **Meetings to be set up on dates where a minimum of 3 Cllrs can make it.**
2. **Either West or East Sussex to be chosen - officers to make determination.**

## Annex 1:

### Resident's Survey – Extract from the [minutes](#) of the Resources and Performance Select Committee meeting on 16 December 2019:

1. The Cabinet Member for Corporate Support highlighted the particular indicators RS 01 and RS 02 ('satisfaction with the way the council runs things' and 'satisfaction that the council offers good value for money' respectively), which had been given a target following the previous meeting. These targets were developed in comparison with other local authorities.
2. The Committee thanked the Cabinet Member for adding the targets and queried how the surveys collecting the data operated. It was concerning that while most targets were aspirational, RS 01 and RS 02 had low or static targets. The Executive Director of Transformation, Partnerships and Prosperity explained that data was gathered using both online and telephone surveys, the latter being collected by a market research company.
3. A Member asked where approximately the council stood on customer satisfaction and value for money in comparison to other local authorities. The Cabinet Member detailed some previous figures for satisfaction from other authorities, which ranged from about 58-60% (compared with Surrey County Council's latest result of 53%).
4. With regards to value for money, the Cabinet Member quoted figures of around 40-44% (compared with Surrey County Council's latest result of 35%). However, these figures were for borough councils, not county councils, so they were not directly comparable. Issues with RS 01 and RS 02 and how the data was collected could be investigated by the Customer Services Task Group.