



Westmorland
& Furness
Council

Customer Strategy

2024-27



‘**Customers** at the
heart of everything
the Council does’



Foreword

Customers at the heart of everything we do

Being clear about how we will work with residents, businesses and visitors is essential to how our vision for Westmorland and Furness Council will be delivered in a meaningful way.

We are delighted to share with you our first Customer Strategy, making Westmorland and Furness 'a great place to live, work and thrive'.

Here we describe our intention to be a customer focused organisation, in line with commitments already made in the Council Plan, by:

- caring, listening and always having our customers at the front and centre of everything we do.
- recognising and acknowledging all customers and communities needs when designing and delivering services.
- ensuring equitable access to services and information without compromising on quality.

The changes and improvements required to deliver and make a difference include:

- creating new ways for customers to contact us, ensuring a consistent experience and accessible service for all.
- developing and embedding good practice when listening and working with residents, businesses, visitors, staff and elected councillors

We are confident that Westmorland and Furness Council will be strengthened by this new rich and inclusive, collaborative and caring approach which fully reflects our values and ambitions.

“Together we can”.

Councillor Dyan Jones
Cabinet Member for
Customer and Waste



Sam Plum
Chief Executive



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Customer Strategy

Westmorland and Furness Council is here to serve its communities and is committed to putting customers at the heart of everything it does. It is important to us to provide a positive customer experience to all our customers, whenever and however they interact with us or access our services.

The combining of teams and services previously delivered by four councils into one presents a unique opportunity to establish Westmorland and Furness as a council that delivers high quality, value for money services in an effective and timely manner.

Residents, businesses, communities and visitors all access services from the council in different ways dependent on their needs. We recognise that not everyone from these groups might describe themselves as a “customer”, however for the purpose of this strategy we have adopted this phrase to describe all groups and individuals that use council services.

We are in a time of great change. Westmorland and Furness Council was created in April 2023, bringing together the teams and services delivered by four legacy councils in the Westmorland and Furness area.

In addition, the public sector and in particular Local Government faces ever reducing budgets for public services, coupled with a change in individual’s and communities’ needs and expectations.

As a result, this is the perfect time for the council to ensure that we commit to deliver high quality, value for money services from our customers’ perspective.

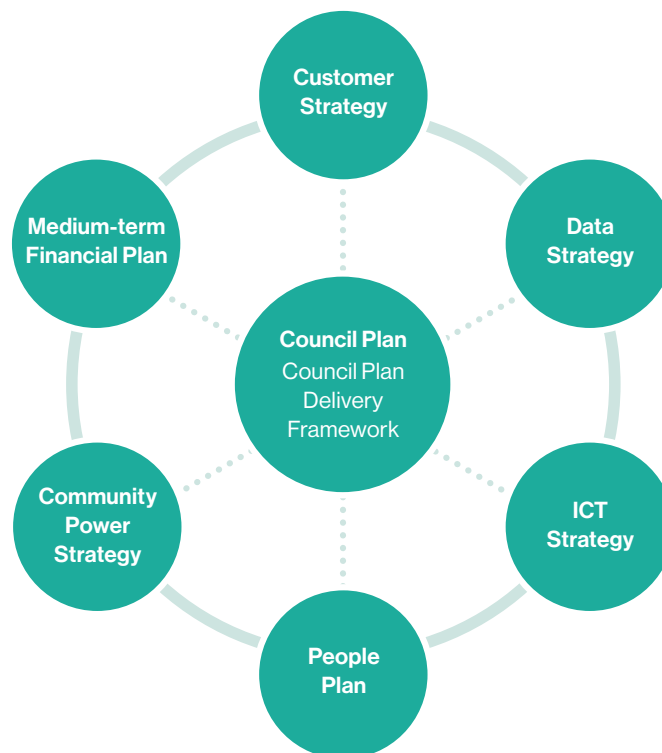
The council is committed to understanding our current and future customers’ needs and expectations to ensure services are designed in the best way to deliver what is needed.

To create this strategy, we have drawn on best practice from the public and private sector, and insight gained from customers, staff and councillors feedback.

This Customer Strategy describes what we want to achieve over the next 3 years and the action we will be taking to make sure our approach is fit for the future.

The Customer Strategy is a foundational strategy that will support the delivery of the Council's vision and priorities, as detailed in the Council Plan and Council Plan Delivery Framework.

Having a plan for how we work with, and for, our customers is crucial for all council services; a clear customer strategy is essential to support the creation and delivery of a suite of Westmorland and Furness foundational strategies.



We have an ambition to reduce inequalities and discrimination within Westmorland and Furness. We want to be a council that understands and takes account of the varying needs and experiences of the different groups among our community, working hard to ensure all our customers, staff and councillors are included, supported and celebrated for who they are.

An Equality Impact Screening has been undertaken to understand the potential impacts of this strategy on people with protected characteristics. This screening has shown that no negative impacts were found for anyone with a protected characteristic. In addition, the screening has highlighted several positive impacts that could be realised for older adults, people with disabilities, people where English is not their first language, people in rural areas and people impacted by socio-economic inequality. More detailed equality and diversity impact assessments will be undertaken as part of the work to deliver key actions in support of the strategy.

Our Vision

The vision for our customers has been shaped by the Westmorland and Furness Council Plan, Council Plan Delivery Framework and Target Operating Model.

Customers are a key element to all the Council's strategic plans; this strategy will detail how we will deliver on these ambitions:

Council Plan

- Customers at the heart of everything the council does.

Council Plan Delivery Framework

- Communities and customers are at the heart of everything we do and can access efficient services.
- Our customers are satisfied with their experience of the council.

Target Operating Model

- Services will be user friendly, caring and accessible through multiple channels. Wherever possible services will be available and delivered digitally, reducing demand for phone and in-person interaction so those resources can be focused to those most in need.
- Effective Services: Services are outcome focused and maximise the use of technology to drive efficiency and effectiveness. Service delivery is citizen centred and seamless between services and partner organisations.

The vision for our customer strategy has been shaped by the Westmorland and Furness Council Plan, Council Plan Delivery Framework and Target Operating Model.

Our vision for Westmorland and Furness is to be:
“A great place to live, work and thrive.”

Our priorities:

For people

Supporting active, healthy happy lives for young and old.
Supporting people in need and reducing inequality.

For the climate

Providing leadership in the drive to become carbon net zero.

For communities

Confident, empowered, resilient communities.

For the economy and culture

Sustainable, inclusive, economic growth.

For our customers

At the heart of everything we do.

For our workforce

Confident, empowered and inclusive workforce.

Making our vision real

Where we are now

Westmorland and Furness Council was created in April 2023, bringing together the teams and services delivered by four legacy councils in the Westmorland and Furness area.

A lot of work was completed to make sure our customers could easily contact us from day 1 of the new council. However, there is still a significant amount of change needed and longer-term transformation to simplify and streamline the way customers interact with us to improve their experience.

The work to harmonise services and processes will take a number of years given the range and scale of activity the council offers, meaning the customer improvement journey will take time and will need prioritisation.

As we start this journey it's important to understand our current approach and performance. We have spent some time looking at the way things currently work and we found:

- There are some **good examples of positive practice** and an incredibly strong improvement ethos and appetite for change from the whole organisation
- The main channels customers choose to transact with us are by coming to see us in a building (face to face) and by telephone, **73%** of contact is made through these channels and are more expensive channels based on industry standards
- At least **44%** of customer contact is going direct into services rather than through one of the customer service teams which means there is a high degree of variation in approach and experience for customers
- There are currently inconsistencies in the way we enable customers book, pay, tell, register, apply, or check things with the Council, which can be addressed by **standardising our approach**, especially through the Council website development.
- The customer **experience of using the website** is highly variable and depends on locality and type of service
- Performance information relating to customer experience is not consistently gathered and **performance varies across localities**

We are committed to further understand our customers through a variety of ways. In addition to the data we have on customer contact we have sought feedback from our councillors, internal staff focus groups and through groups that represent or advocate for customers. This feedback tells us we need to:

- be approachable and friendly
- understand customers and their needs
- be contactable in a range of ways – online, telephone, face to face
- have an easy to use Westmorland and Furness website so customers can find the information and support they need easily and at a time that suits them
- seek and value customer feedback
- ensure customer service teams have high levels of knowledge to ensure a good service to customers, with first point of resolution to their query wherever possible
- respond to all customer contacts, in a timely manner
- engage with advocacy organisations to ensure they can support the most vulnerable to engage with council services
- empower and support those staff dealing directly with customers, to ensure they have the knowledge and support needed to do their job
- better understand and help to overcome barriers to accessing services that some people experience, such as poverty, trauma, literacy levels, physical accessibility, confidence levels, previous bad experiences, neuro diversity, rurality, low income
- establish, where appropriate, a personal connection with our customers to overcome barriers to accessing our services
- communicate with customers in easily understood language and provide information in different languages and formats



What we want to achieve

Our approach to customers must evolve over time and change if we are to deliver an improved customer experience and support customers to achieve the outcomes they want.

This strategy will be an important driver for how the organisation will operate in the future.

Our vision is that ***‘services will be user friendly, caring and accessible through multiple channels. Wherever possible services will be available and delivered digitally, reducing demand for telephone and in-person interaction so those resources can be focused to those most in need’.***

Being a customer focused organisation will require a joined up, whole council approach with buy in and action at every level. Organisations that do this well can demonstrate:

- Visible customer focused leadership
- An understanding of their customers
- End to end design of customer journeys
- A confident and empowered workforce
- Aligned and engaged back office teams and supporting processes
- Data driven, using insight, intelligence, performance and management information and feedback to inform design and drive continuous improvement
- A customer focused culture

The Council’s values are closely aligned with how a customer-focused organisation operates. This will help us embed the concept of a customer first approach in the way we operate.



Ambitious

Delivering the best experience for all Westmorland and Furness customers



Collaborative

Working across the whole Council with communities and partners to deliver joined up services to all



Responsible

Everyone taking responsibility for their role in ensuring a good customer experience



Ecologically aware

Considering how the use of digital channels can support a reduction in the carbon footprint for Westmorland and Furness



Inclusive

Ensuring that everyone can access our services and taking action to remove barriers that get in the way of this happening



Outcome focused

Listening to our customers and communities to understand what they want to achieve to ensure their needs are met in the most effective way



Needs-led

Focusing on our customers’ needs when designing our services and interactions

Design Principles

High quality customer service is a key element of the council's target operating model. Work is ongoing in 2024/25 to refine the customer related design principles so that customer journeys are efficient, seamless and designed to provide a consistent high quality customer experience.

Design principles currently include:

- We minimise the steps the customer needs to take to access what they need
- Information is simple and easy for users to understand
- First contact resolved through the customer service centre wherever possible
- Self-service is utilised wherever possible
- We put user needs at the heart of our service design
- Customers only need to tell us once, wherever possible
- We optimise technology to create a seamless experience and efficiencies
- We take a consistent approach to managing customer experience across multiple channels and services
- We work proactively with our customers and with honesty
- We measure, track and continuously improve customer service performance.

How we will get there

Outcome 1

Create a better **customer experience** by delivering customer-focused, accessible and inclusive easy to use services.

We will:

Develop a customer charter and implement service standards to ensure a high quality customer experience, being clear about what customers can and cannot expect.

Implement a multi-channel plan for how we will develop each of the key channels that customers use (website, face to face contact, telephone) and over time explore the potential use of additional channels such as chat bots, assisted chat and social media.

Develop our website offering to enable customers to self-serve for as many services as possible, so it is possible to book, pay, tell, apply, check and register for services at time that suits them.

Invest in our physical face to face customer offer so that it is of high quality, with assistance offered to support customers who want to self-serve in these spaces, whilst also offering meaningful, value added conversations in person.

Ensure council information and services are easy to find, understand and access by all of our customers, with a commitment to working with individuals and groups to tackle any barriers.

Further explore the future requirements of a customer relationship management system and a “customer account function” with a clear plan for delivery.

Develop an organisational approach to user centred service design to provide teams with tools and guidance on how they can involve customers in the design of services so that these are well suited to their needs and preferences.

Further develop our approach to customer data, intelligence and insight, to make sure we gather and use a wide range of customer data to better inform service design and delivery, including the need to draw from lived experience and feedback received.

Redesign priority services and put in place a rolling programme of services, which will undergo a level of re-design from a customer perspective. The focus will be to improve the customer experience and increase value for money where possible. We will be focusing on services in the council's priority programmes.

Be honest with customers when things do not go to plan or performance is not to the standards we aim for, committing resources to rectify the issue as soon as possible.

Explore how our customer access channels can connect with the wide range of community led networks, groups and places so that our customers can easily get to the information or service they need through these routes.

Adapt and keep under review our approach to customer experience to compliment and support our new and emerging community power work, which is exploring and developing our relationship with our communities.

Outcome 2

Create a **customer centric culture** and new more efficient ways of working

We will:

Encourage and develop a customer focused culture, putting in place staff training, best practice sharing and development opportunities.

Implement health, safety and wellbeing initiatives to promote positive working between employees and customers, with an unreasonable customer policy in place should it be required by exception.

Support councillors in their role, by providing them with the information and tools they need to support our customers to access council services.

Work with councillors, MPs, Parish and Town Councils to support people to access council and partner services in the most effective ways.

Ensure customer service staff utilise and develop their expertise to advise on partner and community led services that could be of use to our customers.

Ensure that council services provided by our partners on our behalf and commissioned services have the same dedication to a customer focused approach.

Encourage a learning culture, where customer feedback is valued and used to make improvements to council services.

Outcome 3

Deliver **effective, efficient and value for money** customer service

We will:

Establish a single customer service centre to deal with all digital transactions and telephone enquiries resolving as much as possible by a single customer service team. Complex cases will be triaged into service delivery teams for further support.

Apply agreed design principles and guidelines to ensure a consistent approach to customer contact across the organisation. The design principles and guidelines will be applied for each council service, in the most appropriate way, using customer journey mapping, data, intelligence, evidence and insights to ensure the customer access route put in place best meets the needs of the customer.

Develop our self-service customer offer, maximising new technologies to facilitate simple and cost effective access to services in a way that enables customers to do things in a way and at a time that best suits them.

Key to delivering these three strategic outcomes are our people, technology, processes, governance and approach to data.

People – having the right people doing the right jobs supported in the right way is critical.

Technology – to achieve a digital first, multi-channel approach and the model of customer contact we want to adopt will rely heavily on the use of technology.

Processes – to provide a seamless and consistent customer experience we need harmonised and standardised processes and procedures.

Governance – to achieve the consistency we are seeking we will need to put in place policies and principles in relation to customer experience and how customers contact and interact with us.

Data and intelligence – we need an agreed approach to gather, store and make best use of customer data, intelligence and insight.



What success looks like

We need to know that our Customer Strategy is making a difference, so it is important that we measure and evaluate our success. There are several ways in which we will monitor and measure how well we are doing, and whether we are achieving our aims and objectives.

As a new organisation, we accept we have a significant programme of works to stabilise, improve and transform the council, which will take time to implement.

Our measures, together with our priorities, will need to be reviewed and may need to be adapted and developed on an annual basis to ensure we are measuring our achievements in the best way we can.

Key success measures and impact

Outcome 1

Create a better **customer experience** by delivering customer-focused, accessible, easy to use services.

We would expect to see:

- better understanding of, and increased customer satisfaction
- an increase in the proportion of contact delivered through our digital channels
- a reduction in face to face and telephone contact as digital becomes our customers' first choice, resulting from improvements made to our offer
- an improvement in the way we handle telephone calls
- a reduction in the amount of direct contact into services
- reductions in avoidable contacts.

Outcome 2

Create a **customer centric culture** and new more efficient ways of working

We would expect to see:

- better understanding of, and increased customer satisfaction
- greater focus on compliments, positive feedback and learning from others across all sectors to inform our commitment to continuous improvement
- performance improvement in dealing with complaints, subject access requests and freedom of information requests in a timely way
- an embedded customer focused culture within the council
- empowered councillors that can support customers to access services.

Outcome 3

Deliver **effective, efficient and value for money** customer service

We would expect to see:

- better understanding of, and increased customer satisfaction
- reduction in costs associated with non-digital contacts, with efficiencies contributing to the financial sustainability of the Council
- customer service centre resolves an increased number of issues at first point of contact
- specialist staff have more time available for delivery of more complex issues

The ambitions detailed in this strategy will be delivered over 3 years, with an annual delivery plan setting out key activities.



Translation Services

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للوصول إلى هذه المعلومات بلغتك، يرجى الاتصال 0300 373 3300

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