

## Council Redesign Programme and Accessibility Review Panel

### Members

Councillors Mandy Darling (Chairwoman), Atiya-Alla, Barnby, Barrand, Brown, Douglas-Dunbar, Foster, Kennedy, Chris Lewis, Loxton, Mills and O'Dwyer

(Contact Governance Support on t: 01803 207087 or e: [governance.support@torbay.gov.uk](mailto:governance.support@torbay.gov.uk))

A meeting of **Council Redesign Programme and Accessibility Review Panel** will be held on **Wednesday, 2 March 2022** commencing at **2.30 pm**

The meeting will be held remotely via Zoom (the links to the meeting are set out below)

Join Zoom Meeting

<https://us02web.zoom.us/j/89606070370?pwd=dWINS0IDdGJyNIRkT2IDK2tkWmxFQT09>

Meeting ID: 896 0607 0370

Passcode: 078007

One tap mobile

+442034815240,,89606070370#,,,,\*078007# United Kingdom

### Agenda

1. **Apologies**

To receive apologies for absence, including notifications of any changes to the membership of the Panel.

2. **Declarations of Interest**

a) To receive declarations of non pecuniary interests in respect of items on this agenda

**For reference:** Having declared their non pecuniary interest members may remain in the meeting and speak and, vote on the matter in question. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.

b) To receive declarations of disclosable pecuniary interests in respect of items on this agenda

**For reference:** Where a Member has a disclosable pecuniary interest he/she must leave the meeting during consideration of the item. However, the Member may remain in the meeting to make representations, answer questions or give evidence if the public have a right to do so, but having done so the Member must then immediately leave the meeting, may not

vote and must not improperly seek to influence the outcome of the matter. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.

**(Please Note:** If Members and Officers wish to seek advice on any potential interests they may have, they should contact Governance Support or Legal Services prior to the meeting.)

**3. Update on Customer Relationship Management System**

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To receive an update on the preparatory work for the Customer Relationship Management (CRM) System in the lead to the next phase of the project due by the end of March 2022.

**Key Lines of Enquiry:**

- How will the Council ensure that the CRM programme is on target and within budget?
- What progress had been made to engage with Council Officers to ensure that they are on board with the changes to the way we work with our customers and what assurance can be given that Officers will be able to review their services and webpages within the project timescales?

**Instructions for the press and public for joining the meeting** If you are using an iPad you will need to install Zoom which can be found in the App Store. You do not need to register for an account just install the software. You only need to install the software once. For other devices you should just be taken direct to the meeting.

### **Joining a meeting**

Click on the link provided on the agenda above and follow the instructions on screen. If you are using a telephone, dial the Zoom number provided above and follow the instructions. (**Note:** if you are using a landline the call will cost up to 13p per minute and from a mobile between 3p and 55p if the number is not covered by your inclusive minutes.)

You will be placed in a waiting room, when the meeting starts the meeting Host will admit you. Please note if there are technical issues this might not be at the start time given on the agenda.

Upon entry you will be muted and your video switched off so that only the meeting participants can be seen. When you join the meeting the Host will unmute your microphone, ask you to confirm your name and update your name as either public or press. Select gallery view if you want see all the participants.

If you have joined the meeting via telephone, your telephone number will appear on screen and will be displayed for all to see until the Host has confirmed your name and then they will rename your telephone number to either public or press.

### **Speaking at a Meeting**

If you are registered to speak at the meeting and when it is your turn to address the Meeting, the Chairman will invite you to speak giving the Host the instruction to unmute your microphone and switch your video on (where appropriate) therefore please pause for a couple of seconds to ensure your microphone is on.

Upon the conclusion of your speech/time limit, the Host will mute your microphone and turn off your video.

### **Meeting Etiquette for Registered Speakers – things to consider when speaking at public meetings on video:**

- Background – the meeting is public and people will be able to see what is behind you therefore consider what you will have on display behind you.
- Camera angle – sit front on, upright with the device in front of you.
- Who else is in the room – make sure you are in a position where nobody will enter the camera shot who doesn't want to appear in the public meeting.
- Background noise – try where possible to minimise background noise.
- Aim to join the meeting 15 minutes before it is due to start.



# Overview & Scrutiny

CRM Survey - Learning Points

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**TORBAY COUNCIL**

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# Introduction

- We have been running two surveys to ensure the customer voice is heard as we head towards mobilisation of the CRM.
- One survey is for people who call us and the other is for people who use our website.
- We have had circa 300 responses to the end of 2021.
- This deck provides the headline learning to date - the surveys are still live and where further insight produces new learning this will also be incorporated in the project.



# Response

- Website users access our website on computers (41%), tablets (24%) and their phones (35%).
- 70% of website users are looking for information, 30% want to pay, apply or report. 10% selected other (purple), but insight exposed they were all looking for information as well.
- 13% of users said they hardly ever found what they were looking for on the website, 24% said it was hard to use, 62% said they found what they needed every time or most of the time.



# Learning

- Our new portal must be optimised for all platforms, this is already in scope.
- We can help the majority of customers find what they need by tailoring our communications with them, pushing info rather than them having to pull it wherever beneficial. This will be enabled through the new My Torbay accounts.
- Although the website has been and continues to be improved there is still room for more improvements, which will be enabled by the CRM and further associated advances.



# Response

- The majority (71%) of people who call us do not visit the website first.
- Most people who don't use the website call us because they would rather speak to someone (78%), 13% of people call us because they don't have internet access and 9% of people called because they couldn't find what they needed on our website.
- There was a fairly even split of people calling us for information or wanting to pay, apply and/or report something. The remainder (orange) selected 'something else', where responses focused on appealing PCNs.



# Learning

- The new services need to be promoted on our call centre lines to encourage channel shift.
- There will be resistance to channel shift for those who would rather speak to us as we become digital by default.
- We can expect call volumes to reduce no further than 87% as we move it towards the digital advocacy model.
- We can provide for our customers' needs with online services, all first contact needs handled through the call centre can be handled digitally at first point of contact.

# Response

- We asked what would help those calling us use the website. 44% said they would never use the website, 20% wanted a clearer home page, 7% wanted support, 6% needed internet access, 21% selected something else, which were not conclusive.



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- We asked if callers would find their own profile, tracking and tailored communications helpful, the responses correlated within 3% of those who did visit the website before calling us. IE circa 30% said one or more of these would be helpful, the remainder wanted to call us rather use the website at all.



# Learning

- Our customers need convincing to channel shift to the website, this will require positive prior communications of the benefits. Very few customers have limitations to using our website, digital advocacy is planned, but will not need to be large scale.

- Our planned improvements will be welcomed to those already open to digital offerings. Promotion of the positives of digital interaction with the Council will be required to bring the majority of call centre users on our digitalisation journey.

# Questions?