Overview & Scrutiny

CRM Survey - Learning Points

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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

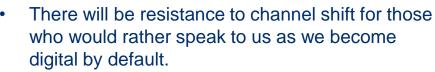- The majority (71%) of people who call us do not visit the website first.

- 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.
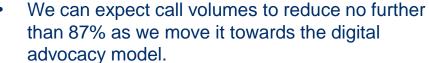
- There was a fairly even split of people calling us for information or wanting to pay, apply and/or report something. The remainder (orange) selected 'something else', where responses focused on appealing PCNs.

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.
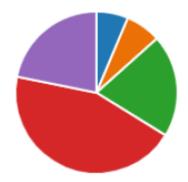
- We can provide for our customers' needs with online services, all first contact needs handled through the call centre can be handled digitally at first point of contact.

Response   # Learning

- 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.

- 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.

- 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.

- 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?

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