

COPELAND BOROUGH COUNCIL



CUSTOMER SERVICE DELIVERY AGREEMENTS

PROJECT BRIEF

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Project Brief

1. **Background**

The majority of initial face to face and telephone enquiries from citizens to the Council are dealt with by Copeland Direct (CD). In many instances these enquiries are dealt with at the first point of contact by CD but others, generally of a complex or specialist nature, result in the customer being referred to the relevant 'back office' service department.

To date no formal agreements have been put in place between CD and service departments which define and formalise the boundaries for handling customer enquiries, ie what should be handled by CD, when an enquiry should be handed over and what information should be gathered by CD to ensure the handover is as seamless as possible and avoids the situation where the customer has to repeat information previously given.

The lack of any formal agreements can also result in a customer:

- Receiving inconsistent service based on the knowledge of an individual Customer Service Officer
- Having to deal unnecessarily with more than one person, ie Multiple handling, which would count as 'avoidable contact' as defined by NI14

From the Council's point of view the lack of formal agreements can result in:

- Inability to effectively plan CD resources
- Poorly trained and possibly stressed CD staff
- Poor relations between CD and service department staff
- Time wasted as a result of poor or unnecessary double handling or ineffective handovers

The aim of Customer Service Delivery Agreements is to put in place formalised agreements between CD and service departments that will address the above problems and, most importantly, provide a consistently high level of service to our customers where 80% of enquiries are dealt with by CD at the first point of contact and where customers need to be informed on progress, this will take place in whatever method was previously agreed i.e. by phone, web, email or text.

2. **Outline Business Case**

This project will contribute directly to the Council's Customer First Initiative.

It will also contribute to the aims of the T-Enabling programme in providing 'simple and efficient access to services'.

Undertaking this project will provide the following benefits:

- A measurable improvement in NI14 performance across the Council by October 2010
- Time savings within CD and back office departments through enquiries being handled at the correct point of contact
- Improved customer satisfaction levels

3. **Project Definition**

Project Objectives

- To formalise the demarcation between CD and service departments which will aim to ensure that 80% of initial customer requests are answered by Copeland Direct

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- To put in place formal CSDAs between CD and service departments which document the above.
- To identify opportunities for process re-engineering and greater systems integration.
- To ensure that these CSDAs are regularly reviewed by the relevant service department manager and Customer Services manager and updated as necessary.
- To provide the CS manager with a basis for resource planning and staff training.
- To provide the information to enable the development of effective CRM service scripts.

Project Scope and Exclusions

- CSDAs will be developed for all customer enquiry types dealt with by CD and / or handed over to a service department 'back offices'.
- CSDAs will be a prerequisite to the development of all new CRM service scripts.
- Whilst the development of CSDAs will include minor process or role changes it will not involve any significant process improvement activity. Where the need for such major improvements is identified these will be undertaken as specific PIT projects, subject to the approval of the relevant programme board.
- This project will not examine any back office processes or systems.

Outline of Project Deliverables / or Desired Outcomes

- A suite of agreed and approved CSDAs – number to be confirmed during project initiation stage
- Supporting CRM service scripts

Constraints

- None

Interfaces

- This project forms part of the T-Enabling programme

Approach

During project initiation the PIT, in conjunction with the Customer Services Manager will develop a methodology for prioritising the development of CSDAs. Following this a list of the required CSDAs will be developed and from this an implementation programme will be agreed.

The PIT will facilitate a meeting between the Customer Services Manager and the relevant service department manager to agree, in broad terms, the scope of the CSDA and any constraints.

The PIT will then facilitate a number of workshops to develop the CSDA content and the input to the CRM scripts.

The PIT will produce the CSDA documents and ensure they are signed off by the department and customer services managers.

The CRM scripts will be developed and implemented by Copeland Direct

Outline Plan

The following provides an indication of the expected timescales of the proposed project.

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Task	Resource	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10
Project initiation																
Develop prioritisation methodology	PIT / Customer Services	■														
Identify CSDAs required	PIT / Customer Services		■													
Confirm CSDA format	PIT		■													
Develop CSDA programme	PIT / Customer Services		■													
CSDA implementation																
Definition workshops	PIT / Customer Services / SE staff			■	■	■	■	■	■	■	■	■	■	■	■	■
CSDA documentation	PIT Customer				■	■	■	■	■	■	■	■	■	■	■	■
CRM script development	Services					■	■	■	■	■	■	■	■	■	■	■
Project review																
Post project review meeting	Project executive															

To take place in October 2010

All CSDAs and supporting CRM scripts to be in place by 1st April 2010

4. **Resource Requirements**

Project roles:

- Project Manager – Bob Gerry
- Sponsor – Jane Salt

The resources for each CSDA are as follows:

The information required to formulate CSDAs and define CRM scripts will be derived from using a workshop approach, as follows:

- Formulation of broad terms of agreement by department manager and Customer Services managers (2 hrs)
- Development of CSDA by department and CD staff representatives (2 – 6 hrs depending on complexity)
- Review and agreement of CSDA content by department manager and Customer Services managers (1 hrs)
- Development of CRM script requirements by department and CD staff representatives (2 – 4 hrs depending on complexity)

5. **Project Costs**

There are no material costs associated with this project. PIT labour costs are estimated at between £225 and £375 per CSDA, depending on the degree of complexity.

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6. Risks

Describe any known risks, and an assessment of their probability and potential impact.

Id.	Risk	Impact	Probability
R1	The expected improvements in NI14 performance are not achieved	High	Low
R2	The expected improvements in customer satisfaction are not achieved	High	Low
R3	The expected time savings in CD and back office departments are not achieved	High	Low