

# Cabinet

<b>Report Title</b>	Customer Strategy 2024-2027
<b>Date of Meeting</b>	30 April 2024
<b>Report Author</b>	Helen Blake Assistant Director Customer & Digital
<b>Director</b>	Paul Robinson Director of Enabler Services
<b>Lead Cabinet Member</b>	Cllr Dyan Jones Cabinet Member for Customer and Waste Services
<b>Why is this a key decision?</b>	<p>1. An executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates. <b>NO</b></p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are "significant" if they are equal to or greater than £500,000. <b>YES</b></p> <p>For clarification, no treasury management decision shall constitute a Key Decision.</p>
<b>Wards Affected</b>	All
<b>Identify exempt information and exemption category</b>	None
<b>Reasons for urgency (only where applicable)</b>	N/A
<b>Appendices (if any)</b>	<p>Appendix 1: Customer Strategy 2024 - 2027</p> <p>Appendix 2: Customer Strategy Delivery Plan 2024 - 2025</p> <p>Appendix 3: Equality Screening</p>

## 1. Executive Summary

- 1.1 This report recommends Cabinet approves the Customer Strategy 2024 – 2027 and Customer Strategy Delivery Plan 2024 – 2025.
- 1.2 The Customer Strategy sets out the high-level direction of travel for the organisation; and is supported by a delivery plan, which will be updated on an annual basis. An equalities screening of the strategy has been undertaken and accompanies this report.

## **2. Recommendations**

**For the reasons set out in this report, Cabinet is recommended to:**

- 2.1 Agree the Customer Strategy 2024-2027 and Customer Strategy Delivery Plan 2024 – 2025.

## **3. Information: the Rationale & Evidence for the Recommendations**

- 3.1 The Customer Strategy is one of the council's foundational strategies that will support the delivery of the Council's vision and priorities. It describes our aspirations to be a customer focused organisation expanding on the high-level commitments we have already made in the Council Plan and Delivery Plan:

- To care about customers; listen and have them at the heart of everything we do,
- Put customers and communities needs at the heart of designing our services,
- Ensure customers are able to access services and information easily and equitably, using a channel of their choice.

- 3.2 This strategy describes the changes and improvements needed to make a positive and lasting difference to our customers. This includes:

- Streamlining and simplifying arrangements for how customers contact us,
- Creating a consistent approach and standard of service from all Westmorland and Furness services,
- Taking action to ensure customers receive a consistent and high-quality experience when they interact with us,
- Developing our approach to listening to and working with citizens and communities to design services that work well from their perspective.

- 3.3 The Delivery Plan 2024-2025 sets out the key activities for year 1 of the strategy, many of which are important to lay a firm foundation for changes that will be implemented in future years. The consolidation of teams, systems and introduction of single policies and procedures is important, to get the basics right as a new Unitary Council before making more significant changes in the medium to longer-term. There are significant interdependencies with the ICT and People Plan; and alignment of activity across these three strategies is essential to ensure success.

## **4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)**

- 4.1 The Customer Strategy supports the operations of the whole council and will support the delivery of all council plan priorities.

## **5. Consultation Outcomes**

- 5.1 The strategy has been informed through engagement with a wide range of stakeholders including Customer Service staff, Poverty Working Group, Service Leads, Change Champions, Trade Unions, Elected Members, representatives from Parish and Town Councils; and Advocacy and Community Groups. This insight and feedback has supplemented the information gathered from baselining activity, customer feedback and research into practice in other authorities and sectors.
- 5.2 Overview and Scrutiny members have helpfully explored the topic on a number of occasions and a workshop open to all councillors took place to develop the strategic direction of travel.
- 5.3 The engagement and feedback provided overwhelming support for ensuring the council provides multi-channel access to customers. The importance of the continuation of a face to face offer, as well as telephony and online options in a blended model was emphasised.
- 5.4 There was also an acknowledgement that, for many customers, the digital offer is important to provide a self-service approach at a time that suits people best. The strategy therefore describes an ambition to increase the range of services and transactions that can be undertaken online in a consistent manner.
- 5.5 The need to understand and address barriers to accessing services emerged as a strong theme from much of the engagement. For example, considering how the lack access to data on mobile phones might impact on peoples ability to contact the council; or considering how the circumstances customers may be living in might impact on the way they present. These types of issues tie in closely with the equality screening that has been undertaken of the strategy and delivery plan; and more detailed equality impact assessments will be required to inform any proposals to change the approach to service delivery.

## **6. Alternative Options Considered**

- 6.1 Members may decide not to approve the Customer Strategy and associated year 1 delivery plan, or they may decide to amend the strategy to reflect a different approach to customers.

## **7. Reasons for the Recommendations**

- 7.1 Given the emphasis in the Council Plan and operating model on taking a customer focused approach, it is important to describe what this means and how the council intends to deliver on its ambition.

## **8. Climate and Biodiversity Implications**

- 8.1 The strategy refers to the council value of “ecologically aware” and makes a statement the council will consider how the use of channels can support a reduction in the carbon footprint for Westmorland and Furness.
- 8.2 As changes are explored about how we best support customers to access services, the impact on climate and diversity will be explored. There is potential for reduction in travel and use of paper.

## **9. Legal and Governance Implications**

Legal Services will support any legal work arising from the Strategy.

## **10. Human Resources Health Wellbeing and Safety Implications**

- 10.1 The Council’s Customer Strategy, together with the People Plan and ICT Strategy, will support the development of our workforce that operates in a customer focussed way. These combined strategies will reflect the importance of developing a digitally skilled and confident workforce, with the ability to meet the expectations of effective and easy access to services.

Employees of the Council deserve to work in an environment that is safe. The Health and Safety at Work Act 1974 places a legal and moral duty on the Council to ensure that the health, safety and wellbeing of the workforce and the customers we serve is paramount in everything that we do. Elements of the Customer Strategy focus on employee and customer safety and so the agreement of the Customer Strategy should comply with the commitments outlined in the Annual Health, Safety and Wellbeing Policy Statement last agreed by Cabinet in April 2023.

## **11. Financial Implications**

- 11.1 There are no direct financial implications of the recommendation to approve the Customer Strategy and the year 1 Delivery Plan as set out in Appendix 2.
- 11.2 A number of the deliverables within the plan will have financial implications for the Council. Business cases will be developed for these within which the financial implications will need to be considered.

## **12. Equality and Diversity Implications (please ensure these are compliant with the EIA Guidance)**

- 12.1 Equality Screening is provided as Appendix 3

## **13. Background Documents**

- 13.1 Not applicable.