CITY OF BOROONDARA
CUSTOMER EXPERIENCE IMPROVEMENT STRATEGY
2014/2015

THINKPLACE
Bridging vision and reality

Strategic Context

This section contains the strategic context around the Boroondara Council.

Strategic environment
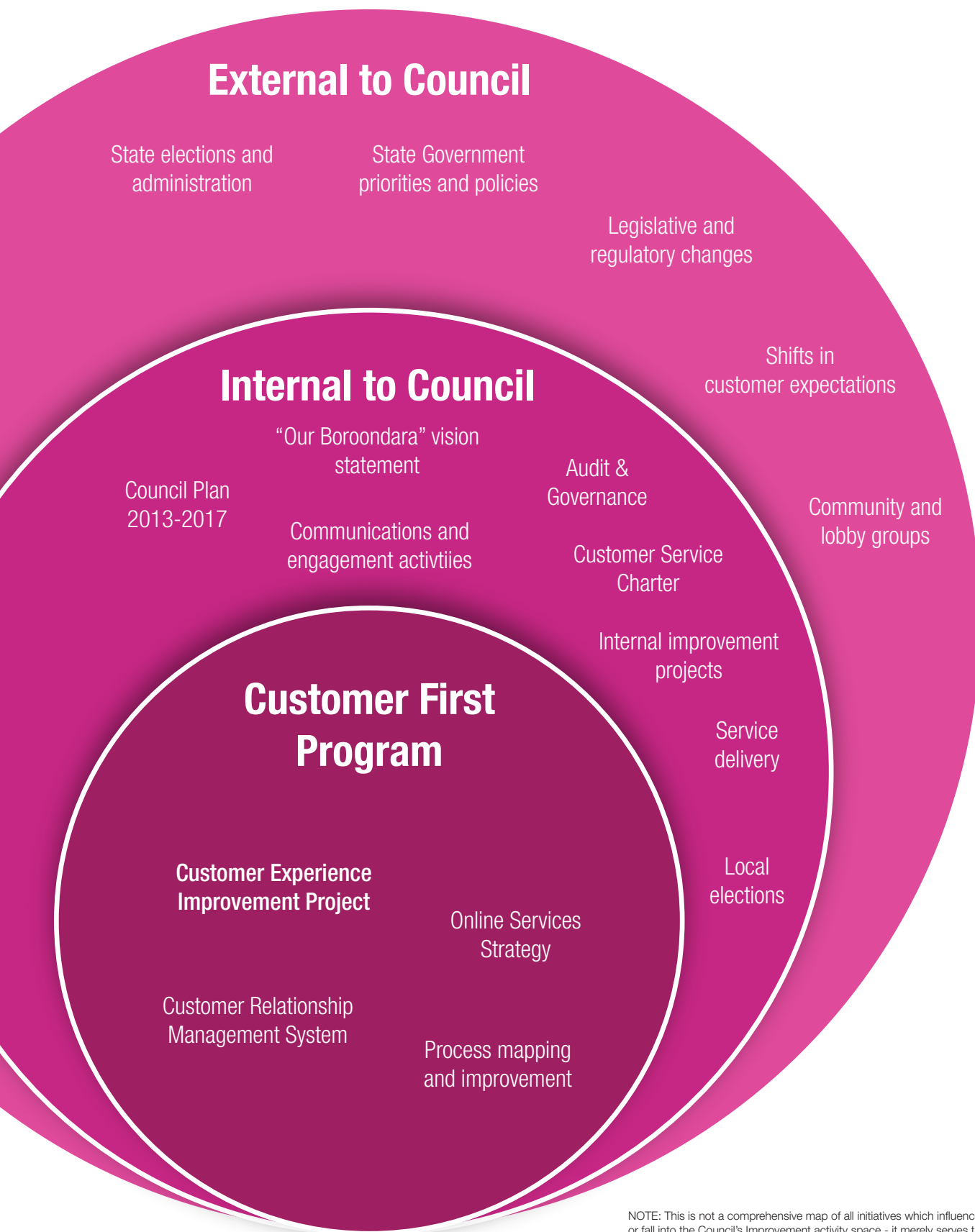## *What is the context of our work?*

We first looked at what else is going on in and around Council in order to be aware of interdependencies and influences.

There is a lot of reform activity going on in Council already, both operationally (how Council runs its business) and in relation to service delivery. Some of these initiatives are still in planning, while others are already underway or have been recently implemented.

Part of the intent of this project is to ensure that the improvements and shifts introduced by the new Customer Experience Improvement Strategy can be harnessed alongside existing projects to develop a cohesive and rolling program of improvement work.

In order to do this, it will be important to recognise and understand the nature and scope of each piece of reform, identify opportunities for leverage or synergy, prioritise, and acknowledge incremental progress without losing sight of the holistic, long-term vision Council has for the future.

Technology changes

External to Council

State elections and administration

State Government priorities and policies

Legislative and regulatory changes

Shifts in customer expectations

Internal to Council

"Our Boroondara" vision statement

Council Plan 2013-2017

Communications and engagement activtiies

Audit & Governance

Customer Service Charter

Internal improvement projects

Community and lobby groups

Service delivery

Local elections

Customer First Program

Customer Experience Improvement Project

Online Services Strategy

Customer Relationship Management System

Process mapping and improvement

NOTE: This is not a comprehensive map of all initiatives which influence or fall into the Council's Improvement activity space - it merely serves to show the scope of initiatives that are out there.

Intent
What is the purpose of our work?

We set out to co-design a robust Strategy which will set the high-level direction for Boroondara's customer engagement into the future and position Council for the next 5-10 years for technological, economic and community change.

Based on the outputs of Phases 1 and 2* of the Boroondara Customer Experience Improvement Project, we have developed this final Strategy and plan which has been validated with key stakeholders within the Council. We worked with the Core Design Team and Council staff at all levels to produce the following outputs and outcomes:

- a vision, value proposition and roadmaps for where Council wants to be in future

- a clear understanding of how Council can realise the best value for the Boroondara community while understanding and managing trade-offs, and

- an understanding of how Council's customer engagement will be enhanced by the new strategy, including specific outcomes and success indicators.

The approach we took was to combine and synthesise:

- the outputs and insights gathered throughout Phases 1 and 2

- the outputs and insights developed during our intensive, two-day ideation ThinkCamp, and

- our ThinkPlace expertise and experience in design thinking and strategic development.

Please see our Current State Assessment and User Insights Reports as a complement to this Strategy and Plan.

Current performance
In general, a good news story

We looked at Council's current and past performance* to identify where improvement efforts should be applied.

Council has high customer satisfaction and good outcomes in general, as reported by past customer research and supported by our own research*.
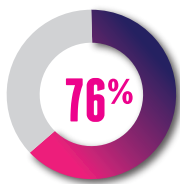
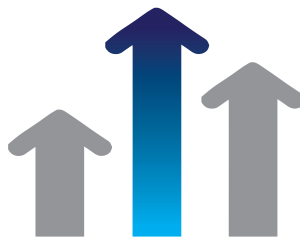# CONTACT WITH COUNCIL IS UP

5 POINTS OVER THE LAST 12 MONTHS

PROPORTION OF RESIDENTS CONTACTING COUNCIL BY TELEPHONE HAS INCREASED SIGNIFICANTLY SINCE 2013

2/3 RDS RESIDENTS REPORTING SOME FORM OF CONTACT WITH COUNCIL

76%

CUSTOMER SERVICE RATINGS ARE HOLDING STEADY, AND ARE **HIGHER THAN** THE STATE AVERAGE

COUNCIL PERFORMANCE IS SIGNIFICANTLY HIGHER THAN METROPOLITAN **AVERAGES**

WITH OVERALL **PERFORMANCE RATING AT 75%**

SERVICE SATISFACTION IS **HIGHER** FOR INTERACTIONS OVER THE **PHONE**

COUNCIL DIRECTION IS ON PAR WITH 2013 AND IS SIGNIFICANTLY **HIGHER THAN** THE STATE AVERAGE

26% SEE A LOT OF ROOM FOR **IMPROVEMENT** WHEN IT COMES TO COUNCIL DIRECTION

59% SEE SOME ROOM FOR **IMPROVEMENT**

COMMUNITY EXPECTATIONS ARE MET, WITH 'RATED' PERFORMANCE EXCEEDING 'IMPORTANCE' IN THE FOLLOWING AREAS

- ARTS CENTRES AND LIBRARIES
- APPEARANCE OF PUBLIC AREAS
- RECREATIONAL FACILITIES
- COMMUNITY AND CULTURAL ACTIVITES
- FAMILY SUPPORT SERVICES

Improvement drivers
Why do we want to do better?

Council already has several strategic improvement priorities it wants to address through this and other projects. Key priorities for customer experience improvement are:

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From current challenge ...   **... to future state.**

1. Fragmented pathways

Customers currently have an experience of Council as opaque, being passed around, repeating themselves and being unsure about contact points.

- A seamless, single view of customer
- Streamlined, low friction pathways to services
- Consolidated contact and touch points

2. Inconsistent channels

Council's channels lack strong strategic alignment and are over-promoted without insight-driven, targeted use and resource allocation

- Channels which are consistent and convenient
- Efficiency balanced with a good experience
- Efficiency through ability to target channel use

3. Responsiveness

While service delivery is generally good, there is a need to improve follow-up, reactivity, and a sense of representation and transparency for customers.

- Insight-driven, proactive and responsive
- Agile in adapting service delivery to ensure it echoes the needs of the community

4. High-cost, intensive interactions

Council does not currently take full advantage of modern service delivery models and channels, resulting in inefficient, one-size-fits-all experiences.

- Intuitive self-service pathways to services
- Choice and convenience empowers customers
- Resources able to be optimally deployed

5. Organisational/Operational culture

Council staff are constrained by internal silos of knowledge, service delivery and communication which prevent full customer experience potential

- A culture of natural innovation and collaboration
- Internal operations and workflows that support our customer experience improvement delivery

Focusing questions
How can we focus our improvement strategy?

How do we better **manage customer expectations** about what we do (and don't do) and why?

How do we **ensure information is accessible, accurate, and consistent** for our customers?

How do we **improve processes** so that they are easy to navigate and better empower our customers?

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Role of Council

How can we ensure customers are better informed about Council's role, remit, structure and operation?

Representation

How do we improve the sense of democratic participation and representation the community have in relation to Council?

Sustainaiblity & support

How can we strengthen the visibility and alignment of Council's sustainability and preservation activities with the community?

Convienience & reliability

How can we increase the convenience and reliability of Council's channels to increase people's trust and awareness of them?

Unequal knowledge

How do we ensure our customers feel better informed and confident to interact with Council?

Navigating bureaucracy

What action can we take to mitigate the perception and experience that Council is intentionally or unnecessarily bureaucratic?

Inconsitent service experience

How do we ensure we are delivering consistent, accurate and up-to-date information and service experiences to our customers?

Customer goals
Why do customers interact with Council?

We needed to translate the scope of Council's service offerings into categories that are meaningful to customers and correlate with their high-level goals. We found that customer interactions fell into the following nine categories, regardless of their specific aims:

Our customers want to...

Get **Information**

Get **permission**

Tell Council something

Get **something fixed**

Pay for something

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Use **Council facilities**

Access **community services**

Be **represented**

Enjoy a certain **lifestyle**

Key pain points
A customers perspective

1.
Inconsistent service experience
Although many participants said their interactions with Council were good or satisfactory, there were others who reported bad or inconsistent experiences.
These were variously attributed to conflicting information or advice, repetition, being passed around, response times or attitude of staff.

2.
Navigating bureaucracy
Many participants stated that their interactions with specific Council departments were bureaucratic or confusing.
Because processes, timeframes and responsibilities are not always clear, many customers make additional calls or visits to Council to seek help or clarification.

3.
Unequal knowledge
Many customers stated that they feel an unequal dynamic when dealing with Council. They feel ill-equipped to resolve disputes with Council as the information they require to present their argument is not accessible, or they feel they need to be experts in order to successfully represent themselves.

4.
Role of Council
Overall, participants had mixed understandings and views on the role of Council: what it can and can't do, how it is structured and organised, and its responsibilities.

Not knowing which agency or level of government to go to, or having misplaced expectations of Council results in mistrust and frustration.

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5. Consultation and follow up

Some participants expressed a sense of inadequate consultation, proactive engagement, and failure to follow-up on matters relevant to individuals or the community.

Participants often accepted Council outcomes and decisions, but felt they had not been informed of these, and that they had to chase matters themselves.

6. Convenience & reliability

Participants were surprisingly varied in their channel and interaction preferences, but key themes were convenience and trusted contacts as a reliable source of information over Council sources.

Some customers opt for the medium of contact that has provided the best outcome for them in the past, rather than the one they prefer.

7. Sustainability & support

Preservation and sustainability of the local environment, character, green spaces, streetscapes and heritage is important to people in Boroondara. Participants felt strongly that Council needed to do more to protect and maintain these aspects of the area, and better support sustainable waste practices by both Council and the community.

8. Representation

In spite of it being their local government, many participants feel disconnected from Council or discouraged from participating. Many spoke in adversarial terms about their interactions and none expressed any particular pride or affinity for Council, even where they believe it does well. Council is not a big part of people's lives, nor do they feel significant to Council.

Strategic objectives

This section outlines the strategic objectives of the Boroondara Council

Our improvement strategy
At a glance

From a customer service model

To produce this customer experience   *by pursuing these strategic objectives...*

Knowledgeable
We are competent and confident in assisting and educating our customers.

Responsive
We are timely, proactive and empathetic.

Personable
We are approachable, friendly and open.

Seamless
We provide a holistic, one-stop-shop experience.

Accessible
We provide choice and convenience

Efficient
We deliver cost-effective, efficient and valuable services.

1. **Improve our online information**

2. **Align and improve our customer channels**

3. **Improve our customer interactions**

4. **Streamline our customer touch-points**

5. **Develop a culture of evaluation**

6. **Simplify and clarify our customer processes**

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To a customer centric model

To ensure that our customers...

1. Have a consistent, positive experience with us

2. Understand what Council can and can't do

3. Are informed, educated and understand us, our role, our services and our processes

4. Have increased choice and convenience in interacting with Council and its services

5. Can rely on Council, our information and advice

6. Are supported to achieve their goals

7. Feel known to us as a whole and real person

8. Feel empowered to interact on equal terms

9. Are informed of the outcomes of their queries, concerns and activities with us

10. See the changes their feedback produces and feel empowered to influence our improvement

11. Value Council and the community it supports

12. Trust Council and rate us highly

Vision
What is the change we want to make?

Our vision for the future is to transform the Boroondara customer experience into one that places the customer at the centre and delivers a more seamless, convenient and empowering experience for all customers.

Current state

Customer Service Model

In a customer service model, customers have to navigate an organisation's structure, to access products and services on an interaction-interaction basis.

Future state

Customer-centric Model

In a customer-centric model, decisions and services are designed with users at front of mind, to give customers the experience of the organisation moving around them

Vision
What is the change we want to make?

Our vision is supported by a set of principles which describe the future customer experience we want to deliver and guide our decision-making, design and evaluation of our success.

KNOWLEDGEABLE

01

We are competent and confident in assisting and educating our customers. We know who can help them if we can't and will connect them.

PERSONABLE

02

We are approachable, friendly and open with our customers. We use their language to talk to them and empathise with their situation.

ACCESSIBLE

03

We empower our customers and provide choice and convenience through user-friendly, reliable, available and intuitive touch-points.

04 RESPONSIVE

We engage empathetically with our customers to provide timely, proactive interactions that meet community and customer expectations.

05 SEAMLESS

We shield the customer from our internal operations to provide a whole-of-customer, 'one-stop-shop' or 'single point of entry'.

06 EFFICIENT

We deliver cost-effective, efficient and valuable services that are insight-driven and prioritise a great customer experience.

Strategic objectives
An overview

The new Customer Experience Improvement Strategy offers a range of improvements that work together to enhance the user experience through improved service delivery, efficiency gains and a holistic approach:

1.

We will improve our online information and services

What does this mean?

We will empower our customers by improving the quality, accessibility and usability of our online information and services, adopting a user-centred approach to redesigning them, and expanding self-service options we offer to better empower our customers.

2.

We will align and improve our customer channels

What does this mean?

We will review and align our customer-facing channels to ensure that they support our strategic objectives and offer an enhanced customer experience, including consistency and clarity across all channels to provide customer choice and convenience.

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3.

We will improve our customer interaction

What does this mean?

We will review our customer interactions, communications and information products to ensure our customers have clarity and understanding, and feel informed and equal. We will deliver a personal and empathetic experience and language.

4.

We will streamline our customer touchpoints

What does this mean?

We will implement practices and platforms that support a whole-of-customer experience, including a single view of customer, consistency across channels and more streamlined touch-points for interaction. We will close the loop on all customer interactions.

5.

We will develop a culture of evaluation

What does this mean?

We seek customer and other feedback, and act on it. We will collect and analyse feedback to understand how well we are meeting our customer experience objectives and translate them into meaningful customer experience improvements.

6.

We will simplify and clarify our customer processes

What does this mean?

We will improve our customer-facing processes by designing with the customer experience and benefit in mind, increase customer options for payment and interaction and build partnerships to support better services.

Strategic objectives
In focus

1. Improving our online information and services

We will empower our customers by improving the quality, accessibility and usability of our online information and services, adopting a user-centred approach to redesigning them, and expanding self-service options we offer to better empower our customers.

Strategic initiative 1.1

A redesign of our website

What is it?
A redesign of Council's existing website(s) to produce a better user experience of seeking information and interacting online with Council.

How will we do it?
- Conducting a user experience assessment of our current websites to discover the pain points, value and preferences of our customers.
- Redesigning our website based on these user insights, including a more user-friendly design and shallower menus and navigation.
- Usability testing our information architecture and design decisions with customers.
- Reviewing and developing content that is clear, appropriate, consistent and accurate.

Success is: increased web information and service use, increased usability, increased customer satisfaction, reliability and availability.

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Strategic initiative 1.2

Expanding online services

What is it?

Expanding the type of transactions and other things customers can achieve online with us through our online services.

How will we do it?

- Reviewing the services we offer online through user testing to find out what customers like and don't like, now and over time as we improve.

- Expanding the services that we offer online.

- Informing customers of our online service offerings, including guidance to get started.

- Making our online services as easy as possible to use to increase take-up, self-service, choice, convenience, availability and reliability.

Success is: increased service options, increased online interaction and transactions, increased usability, increased customer satisfaction, reliability and availability of services.

Strategic initiative 1.3

Online accounts and personalisation

What is it?

Developing a more personalised, account-based experience for online customers that retains their history and preferences.

How will we do it?

- Developing account-based online services that allow customers to log in, store their details and interaction history, and communicate or transact with Council without repetition.

- Linking these accounts with Council's customer relationship management system to automate information transfer, and leverage customer histories.

- Allow customers to tailor their online interfaces to suit their preferences and support self-help.

Success is: take-up of online accounts, demand for and use of personalisation options, good usability, increased customer satisfaction, reliability and availability of services.

Strategic objectives
In focus

2. Aligning and improving our customer channels

We will review and align our customer-facing channels (the media through which we interact) to ensure that they support our strategic objectives and offer an enhanced customer experience, including consistency and clarity across all channels to provide customer choice and convenience.

Strategic initiative 2.1

Review of current channels

What is it?
Assessing Council's current channels: how are they used, why, by whom? What is their value and how do we know?

How will we do it?
- Conducting a review of Council's current customer channels to determine which we are using and why, as well as where the gaps and pain points are, and what can be improved.
- Conducting an assessment of resource allocation to each channel, and the value derived from it, both financially and otherwise.
- Developing a series of recommendations that will feed into Initiative 2.2: Channel Strategy.

Success is: a clear and detailed understanding of Council's channels, including how many there are, what they are used for, who uses them, how effective they are and how much they cost to run.

Strategic initiative 2.2

A Council channel strategy

What is it?

A whole-of-Council Channel Strategy that will guide Council's channel use, including high-level resource allocation and evaluation.

How will we do it?

- Developing a Channel Strategy - with principles to guide Council's channel use - that aligns with the Customer Experience Improvement Strategy, Communications Strategy and other key strategic guidance.

- Ensuring our channel use is optimal, effective and appropriate, meets customer expectations and enhances the customer experience.

- Defining complementary evaluation, quality assurance and governance mechanisms.

Success is: a single, whole-of-organisation Strategy setting the direction and purpose for Council's channels and how they work together.

Strategic initiative 2.3

Aligning channel practices

What is it?

Consolidating and aligning our channel use to ensure that all channels speak with the same voice and deliver appropriate information.

How will we do it?

- Centralising oversight of Council channels to promote a consistent identity, voice and content quality to customers in accordance with the value and characteristics of each channel.

- Developing and implementing supporting policies and processes that support Council staff to deliver on the Channel Strategy.

- Harnessing customer feedback and adapting to trends and expectations through evaluation.

Success is: a cohesive, centralised and quality-assured approach, robust evaluation, channel use reflects customer preferences, increased take-up, cost efficiencies.

Strategic objectives
In focus

3.■ Improving our customer engagement

We will review our customer interactions, communications and information products to ensure our customers have clarity and understanding, and feel informed and equal. We will deliver a personal and empathetic experience and language.

Strategic initiative 3.1

A review of current interaction and communication content and practices

What is it?
A comprehensive review of Council's current engagement and interaction style (voice and tone), processes, roles, products and approach.

How will we do it?
- Conducting a review of Council's current customer interactions to determine who is doing what, how, where the inconsistencies are, and what can be improved with regard to:
  - information content and language, and
  - communications style and approaches.
- Developing a series of recommendations that will feed into Initiative 3.2: Improved whole-of-Council engagement and interaction approach.

Success is: a clear and detailed understanding of Council's customer engagement, including who, how, why, tone and language, investment, processing times, responses, customer feedback.

Strategic initiative 3.2

Improved whole-of-Council customer engagement and interaction approach

What is it?
A coherent, strategic and quality-assured governance framework that applies across all of Council's customer engagement and interaction.

How will we do it?

- Developing a Customer Interaction Guide - with principles to guide Council's customer interactions - that aligns with the Customer Experience Improvement Strategy, Channel Strategy and other key strategic guidance.

- Developing and implementing supporting policies and processes for customer interaction that deliver on the Strategy.

- Defining a supporting customer interaction quality assurance framework and roles.

Success is: a whole-of-organisation framework for Council customer engagement and interaction.

Strategic initiative 3.3

Improved customer engagement and interaction content and practices

What is it?
Operational alignment of customer interaction and engagement practices, language and content with the holistic customer interaction framework in 3.2.

How will we do it?

- Redesigning our interaction style and products to be simple, clear, and user-friendly.

- In alignment with the Customer Interaction Guide and Channel Strategy, determining what messages will be delivered where, how and when at an operational level, ensuring consistency across channels / approaches.

- Training staff how to engage effectively in the new style and approach Council has adopted.

Success is: customer feedback and satisfaction, staff feedback, increased processing speed, cost efficiencies, fewer simple queries being made.

Strategic objectives
In focus

4. Streamlining our customer touch-points

We will implement practices and platforms that provide customer confidence, a high-quality whole-of-customer experience, including a single view of customer, modernised and more streamlined touch-points for interaction. We will close the loop on all customer interactions.

Strategic initiative 4.1

Improved customer touch-points

What is it?
Improving customer touch-points to provide a more seamless experience, and the perception for customers that they have come through the right door to the right person who can help them.

How will we do it?
- Ensuring we understand our customers, their characteristics, goals and experiences through and around Council services and spaces.

- Review and improve our physical spaces, including exploring options for better signage, flow and concierge experiences.

- Reduce and consolidate or centralise Council phone numbers, email addresses, web URLs and other touch-points.

Success is: customer feedback and satisfaction, increased efficiency of interactions (higher speed, lower cost, greater volume, etc.), take-up.

Strategic initiative 4.2

Services where customers are

What is it?
Delivering Council services where customers are (including mobile and pop-up services), maximising channels and leveraging partnerships with the community and other organisations to increase availability, convenience, reach and trust.

How will we do it?

- Dedicate resources to research, design and pilot new and creative ways to deliver Council services where customers are, using user-centred approaches and validation.

- Dedicate resources to building and leveraging partnerships that support Council to deliver more and better services.

- Align with Strategic Objective 1: improving online services and information

Success is: new options for information and service delivery, take-up, customer feedback.

Strategic initiative 4.3

A whole-of-customer view

What is it?
Systems, processes and tools that make customers feel as though they are known to Council that reduce the need for repetition and provide a more personalised experience.

How will we do it?

- Introducing a CRM-backed case-management approach to our customer interactions.

- Develop processes and practices that provide a whole-of-customer experience, including interaction recording and proactive follow-up / outreach. These should shield the user from internal fragmentation and mechanisms.

- Better anticipating customer needs and expectations through feedback and analytics.

Success is: a single, quality-assured, comprehensive record of each customer, accessible to staff and kept up-to-date.

Strategic objectives
In focus

5. ■ Developing a culture of evaluation and improvement

We seek customer and other feedback, and act on it. We will collect and analyse feedback to understand how well we are meeting our customer experience objectives, develop meaningful customer experience KPIs and translate them into tangible customer experience improvements.

Strategic initiative 5.1

A plan for cultural change

What is it?
A comprehensive plan for cultural change across Council, including recruitment, staff qualities and competencies, leadership and knowledge sharing.

How will we do it?
- Conducting a workforce analysis to understand how Council's current capabilities and roles align with, and can support the future Strategy.

- Develop a detailed Plan for Cultural Change, including roles, service descriptions and how to address capability gaps, linked to 5.2.

- Developing and implementing a whole-of-organisation Knowledge Management Strategy to support sharing, redundancy and growth.

Success is: a clear plan for cultural change to Council's customer-centric operation, including how knowledge will be shared, how capabilities will be developed and retained and the qualities and attitudes embodied by Council staff.

Strategic initiative 5.2

A holistic evaluation framework

What is it?

A clear, simple, whole-of-organisation, strategically-linked framework for customer experience performance evaluation to report and improve on Council's performance.

How will we do it?

- Designing a top-down holistic framework that is directly linked to strategic objectives and contributes to continuous improvement.

- Reducing and simplifying the metrics that are gathered and reported on.

- Defining clear courses of action for different measured outcomes (i.e. how will Council respond to various metric outcomes?)

- Building desired qualities and accountability into staff roles and service descriptions.

Success is: a clear, strategically-linked, whole-of-organisation evaluation framework understood and agreed upon by Council staff.

Strategic initiative 5.3

Harnessing customer feedback

What is it?

Gathering and using customer feedback in a systematic and real-time way to directly support ongoing customer experience improvements, and keep up with evolving customer expectations.

How will we do it?

- Determining, in alignment with the evaluation framework, what customer feedback we want, what is valuable and how we will gather it.

- Assessing our existing customer feedback mechanisms to find out what we already gather and what we do with it and how, as well as where the gaps are.

- Developing ways to tightly bind customer feedback into our evaluation and improvement practice so that it is integral to our operation.

Success is: improved customer feedback, increased staff satisfaction, accurate and useful data collection, insight-driven improvements.

Strategic objectives
In focus

6. Simplifying and clarifying our customer processes

We will improve our customer-facing processes by designing with the customer experience and benefit in mind, increase customer options for payment and interaction and build partnerships to support better services.

Strategic initiative 6.1

Making processes easier for customers

What is it?
Simplifying, streamlining and clarifying processes for customers by providing better ways to accomplish their goals, better information and education and reducing customer burden.

How will we do it?

- Ensuring our process improvements are insight-driven and aimed at improving the customer experience.

- Conducting more detailed research into how friction, confusion and other barriers might be alleviated, and to ensure Council continues to evolve with community expectations.

- Identifying ways in which we can remove onus from the customer and Council staff.

Success is: increased customer satisfaction, increased efficiency, increased staff capability, resource savings, take-up of services.

Strategic initiative 6.2

Expanding customer payment options

What is it?
Expanding customer payment options and simplifying and clarifying fee structures or the way we communicate fees and payments.

How will we do it?

- Aligning with Strategic Objective 1: improving online services, to expand the types of transactions customers can complete online.

- Reviewing payment options, fee structures and related information products to deliver a better customer experience of payments.

- Designing and evaluating changes via customer research and co-design to ensure they align with customer preferences and keep up with evolving community expectations.

Success is: customer feedback, take-up of new payment options, through-put of payments, timeliness of payments, efficiency gains.

Strategic initiative 6.3

Building strategic partnerships

What is it?
Building and harnessing partnerships to discover and design new ways of delivering customer services that enhance Council service delivery without extra resources.

How will we do it?

- Working with partners, including community groups, professional associations and the private sector, not-for-profits and other Councils or government bodies to identify opportunities for improved customer service through collaborative or synergistic efforts.

- Resourcing and piloting new customer-driven, co-designed service initiatives.

- Maintaining a deliberate and strategic approach to partnership building.

Success is: stronger partnerships, increased number of partnerships, increased visibility, increased service options and capability.

Impact Analysis

This section in an analysis of the impact the new Customer Experience Improvement Strategy will have.

Impact of inaction
What if we don't change?

The successful implementation of the future Strategy will deliver tangible benefits and outcomes in terms of enhanced customer experiences and satisfaction, as well as having benefits for Council's own operations.

1. Our online information and services

If we don't shift...

Our customers will continue to find the information and services we offer online difficult to navigate, complex and limited in usefulness. We will not be able to offer as much choice and convenience, and will continue to rely more heavily on higher-cost service delivery channels.

2. Our customer channels

If we don't shift...

Our customers will not have the best awareness of our services and information, and interact with us in the ways that they most prefer. They may not trust our information and may perceive us as not keeping pace with modern interaction channels.

3. Our customer communications

If we don't shift

Our customers will feel that we don't speak to them in their language and communicate openly and proactively on matters that are important to them. They may not understand our services and information clearly enough to feel empowered to act for themselves.

4. Our customer interactions

If we don't shift...

We will continue to deliver a service experience that is fragmented and frustrating for our customers and staff. We will continue to pass customers around, duplicate effort, and be unable to truly share and leverage information that would support a holistic approach.

5. A culture of evaluation

If we don't shift...

We will continue to have a fragmented, non-strategic approach to Council performance improvement that is focussed more on measuring and reporting, and less on analysis and design, which enables continuous positive change.

6. Our customer processes

If we don't shift

We will be unable to offer our customers, and support our staff with, a clearer, simpler and therefore more efficient experience of achieving their goals with us. We will not be able to build the platforms and processes on which to base our future growth.

Vision
What is the change we want to make?

The successful implementation of the future Strategy will deliver tangible benefits and outcomes in terms of enhanced customer experiences and satisfaction, as well as having benefits for Council's own operations.

Key benefits to *customers*

More choice and control

Expanded and modernised service options, including self-service, online and 'where customers are' will provide more choice, control and convenience for our customers.

A more responsive and holistic experience

Personalised and personable service interactions with knowledgeable and friendly staff, as well as a sense of being known to Council will help customers feel valued, connected and empowered.

Simpler communications & information

High-quality, consistent, plain language communication and information products will work together with improved delivery channels and accessibility to increase customer and community understanding of Council's role, services and processes.

Trust and reliability

High-quality, consistent, plain language communication and information products will work together with improved delivery channels and accessibility to increase customer and community understanding of Council's role, services and processes.

Key benefits to the *Council*

Efficiency gains and sustainability

A reduction in double-handling, rework, resource intensive   interactions and simple queries will yield efficiencies, allowing Council to allocate its resources more effectively, sustainably and innovatively to delivery additional capability.

Shared information and capabilities

Systems, processes and training that allow staff to quickly and easily share information about customer interactions   will reduce stress and workloads and increase staff capability and sense of satisfaction and competence in their

Evaluation and quality assurance

A holistic and strategically-linked approach to evaluating our customer experience will position us to meet and exceed customer expectations, set benchmarks for best practice and deliver consistent, insight-driven service improvements.

Reputation and pride

The successful implementation of our new Strategy and the cultural and operational shifts it will bring will further develop Boroondara's reputation as an outstanding local Council. As a leader in customer experience design and delivery, we can market our initiatives to help other organisations succeed.

More choice and control

Efficiency gains
and sustainability

More responsive and
holistic experience

Reputation and pride

Shared information

Impact of inaction
What if we don't change?

The successful implementation of the future Strategy will deliver tangible benefits and outcomes in terms of enhanced customer experiences and satisfaction, as well as having benefits for Council's own operations.

1.
Online

Benefits to customers

More choice and control

Responsive & holistic experience

Simpler communications & info

Trust & reliability

Benefits to Council

Efficiency gains & sustainability

Shared information & capabilities

Evaluation & quality assurance

Reputation & pride

City of Boroondara *Customer Experience Improvement Strategy 2014/2015*

2.
Channels

3.
Engagement

4.
Interaction

5.
Evaluation

6.
Process
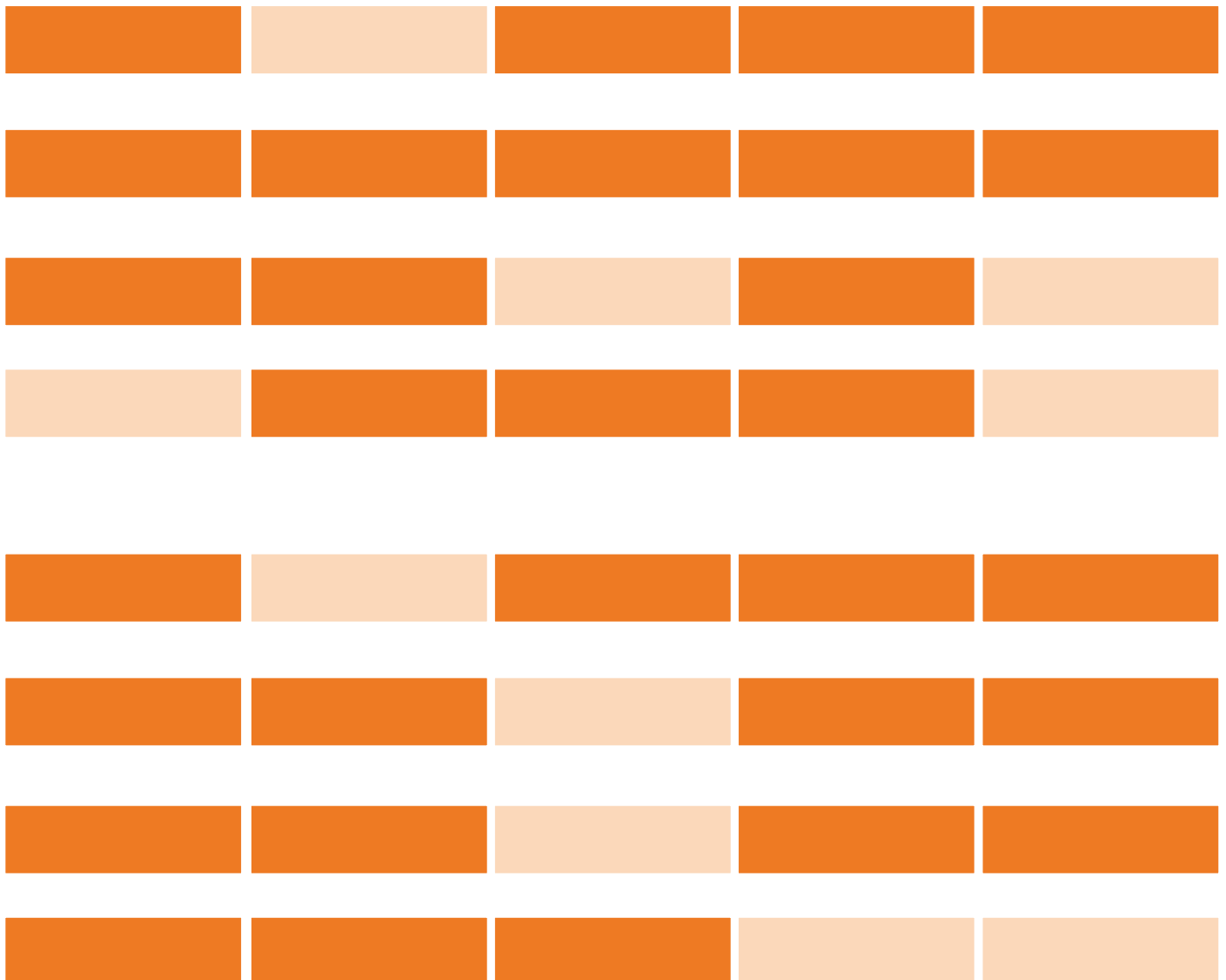
Enacting change
A high level plan

Create visible short term wins

Help customers and staff to see the benefits of change in the short term. Make smaller, lower-cost, high-impact changes quickly, and circulate positive feedback to encourage customers and staff to stick with, and even celebrate, the transition.

Consider your timing

Decide on the best time to instigate specific change initiatives. For example, are there peak periods of service delivery, resource commitment, or interdependencies whose implementation can be aligned for efficiency or best impact?

Be realistic

It's easy to start things! But sustaining momentum for long term change can be a challenge. Balance enthusiasm with realism to ensure that momentum for change is not lost due to disappointed expectations – prepare your team to win a marathon!

5 THINGS

To keep in mind for successful change

Communicate

Effective communication may be the single most important factor in delivering successful change. Communicate your vision and strategic intent clearly. Be honest and encourage two-way discussion, especially when things diverge from your plan!

Involve, don't impose

Most initiatives fail because of a lack of recognition of the importance of culture. Understand, anticipate and develop engagement and communication tactics that acknowledge and harness the values and behaviours of customers and staff.

Enacting change
A high level plan

Successful **business** change requires:

Practical resource allocation

to ensure a sustainable, flexible and efficient application of time, effort and money to implementing the Strategy from adoption to completion, including cost-benefit analyses where appropriate.

Workforce assessment and planning

to determine the current and future structure, nature and capability of Council's customer-facing service delivery workforce, as well as a plan for transitioning staff whose roles are significantly affected by change.

An endorsed and detailed implementation plan

with clear milestones, timeframes, actions and deliverables, backed by interdependency mapping and communicated effectively to ensure alignment with other reforms, projects and initiatives.

A risk management plan

that allows the proactive identification, mitigation and management of risks and issues throughout implementation.

An evaluation framework

that allows Council to measure the progress and success of the implementation, inform decision-making and provide an evidence base for required adjustments (see Initiative 5.2).

Successful **cultural** change requires:

Shared vision and direction

articulated and championed from the top down, to ensure a clear and common understanding of what Council is trying to achieve with its Customer Experience Improvement Strategy, and why.

Clear roles and responsibilities

that are agreed and understood across Council for both the implementation and future management of the new Strategy.

Regular, open communications

that provides up-to-date, transparent and two-way mechanisms for Council staff to communicate, understand and influence the change.

Staff training and support

to ensure everyone is brought along on the journey, shares ownership, and is ready and able to take on the change wherever it affects them, their colleagues and their customers.

Reflection practice

to build a comfortable and embedded culture of constructive, open and inclusive evaluation and knowledge sharing, to foster continuous improvement, learning, innovation, pride and satisfaction amongst staff at all levels.

Cultural change
The key elements

Change management is about people and culture.
The success of organisational change relies on how well the organisation   is able to address and sustain the cultural aspects of the shift.

KPIs &
SERVICE
DESCRIPTIONS

TRAINING &
SUPPORT

RECRUITMENT &
ONBOARDING

COLLABORATION &
INNOVATION

Holistic cultural support for the future customer experience improvement strategy

The degree to which the people and cultural side of implementing the Strategy is effectively managed will determine the ultimate value it delivers to Council, and ultimately, to its customers.

ROLES AND RESPONSIBILITIES

ATTITUDE, COMMITMENT & CHARACTER

KNOWLEDGE SHARING

LEADERSHIP & GROWTH

End state
What will the future strategy deliver?

The future strategy will deliver the following support for the implementation of an improved customer experience:

1. Increased service availability

A shift towards better and more online information and services will empower customers to manage their interactions with Council in line with modern service expectations, improving customer choice and convenience. Online availability of services should also increase accessibility and reliability.

2. A whole of customer view

An individual, whole-person customer experience will deliver more personalised and seamless customer experiences. All interactions with a single customer are managed together, delivered through the implementation of a customer relationship management system and other service improvements.

3. Aligned & improved channels

Council can make better use of available customer channels by aligning them through a whole-of-organisation Channel Strategy, a holistic view of Council channels and supporting policies and processes. Customer channels will be linked to strategic outcomes in a way that is well-defined and deliberate.

4. A skilled, empowered workforce

A knowledgeable, passionate workforce supported by resourcing and tools, to deliver accurate, personalised information and services across Council's current functions quickly and with minimal referrals to other business areas and/or double-handling. Capability is actively developed in desired areas.

5. Improved communication

Simplified, quality-assured plain language information products, forms, instructions and correspondence designed for customers, delivered consistently and accessibly through Council's improved channels. This would include clarification of Council's role, what it can and can't do, why, and the outcomes of all interactions.

6. Efficiency of effort & resources

Providing and guiding customers towards more cost-effective online and self-service options, clearer information and simpler processes will offer a more efficient customer experience and frees up Council resources that can be applied to other customer experience improvement initiatives as desired.

7. Feedback & data better harnessed

Stronger data gathering, sharing and evaluation will enable a more personalised experience for customers and will reduce repetition and double-handling for both customers and staff. Robust data gathering and quality maintenance will also support better anticipation of customer needs and service adaptations.

8. Clearer, simpler processes

Clearer information, simpler processes and better decision-making mechanisms will empower staff and customers to interact and achieve their aims more easily. These processes and practices should be consistent across Council and changes will be made with the customer and their experience front of mind.

Roadmap for success

This section outlines the roadmap for success.

Overview of initiatives
Understanding what we need to do

Meeting our strategic objectives for an improved future customer experience in Boroondara will rely on a staged but sustained implementation of our proposed strategic initiatives:

1. Improving our online information & services	**1.1** A redesign of our website(s)	**1.2** Expanding online services	**1.3** Online accounts and personalisation
2. Aligning and improving our customer channels	**2.1** Review of current channels	**2.2** A Council channel strategy	**2.3** Aligning channel practices
3. Improving customer communications	**3.1** A customer engagement review	**3.2** Holistic approach to engagement	**3.3** Improved products, content & practice

4. Streamlining our customer interactions and touchpoints	**4.1** Improved customer touch-points	**4.2** Services where customers are	**4.3** A whole-of-customer view
5. Developing a culture of evaluation and improvement	**5.1** Review of current reporting	**5.2** A holistic evaluation framework	**5.3** Harnessing customer feedback
6. Simplifying our customer processes	**6.1** Making processes easier	**6.2** Expanding payment options	**6.3** Building strategic partnerships

Prioritisation
How will we allocate our time and resources?

We prioritised the implementation of strategic initiatives based on their relative level of investment and positive impact for customers.

The prioritisation matrix is a tool for determining where change efforts should be allocated and in what order. However, it's important to remember that all the initiatives presented here are worthy of being carried forward and important for Council to succeed in its Strategy.

Initiatives that are high impact and low investment should be pursued and completed within the first 1-2 horizons.

Initiatives that are high impact but also higher investment generally require more planning but should also be prioritised to commence within the first 1-2 horizons.

Initiatives that are low investment but also low impact should be pursued if there is room between the quick wins and big wins.

Finally, initiatives that are low impact and high investment should occur after the other initiatives are successfully underway.

Impact on the customer experience

HIGH   MEDIUM   LOW

Relative level of investment

LOW   MEDIUM   HIGH

6.1 Making processes easier	**3.2** Holistic approach to engagement	**2.2** A Council channel strategy
3.3 Improved products, content & practice	**2.3** Aligning channel practices	**3.1** A customer engagement review
6.2 Expanding payment options	**5.3** Harnessing customer feedback	**2.1** Review of current channels
1.1 A redesign of our website(s)	**4.1** Improved customer touch-points	**5.2** A holistic evaluation framework
1.2 Expanding online services	**4.2** Services where customers are	**5.1** Review of current reporting
4.3 A whole-of-customer view	**1.3** Online accounts and personalisation	**6.3** Building strategic partnerships

A timeline for action
When will we make each initiative happen?

We developed a high-level timeline for action based on our prioritisation of initiatives and four horizons for change that will see Council through from the immediate future to 5+ years from now.

H0: strategy adopted	H1: 6 months to 12 months	H2: 12 months to 2 years	H3: 2 to 5 years and beyond
	1.1 Website redesign	continuous improvement...	
	1.2 Expanding online services	continuous improvement...	
		1.2 Accounts and personalisation	continuous improvement...
2.1 Review of channels	repeat in accordance with Channel Strategy		
	2.2 Channel strategy	implementation and review...	
		2.3 Aligning channel practices	continuous improvement...
3.1 Customer interaction review	repeat in accordance with holistic framework		
	3.2 Holistic framework	implementation and review...	
		3.3 Improvements	continuous improvement...
	4.1 Improved touch-points	continuous improvement...	
		4.2 Service where customers are	continuous improvement...
		4.3 Whole-of-customer view	continuous improvement...
5.1 Plan for cultural change	repeat in accordance with Channel Strategy		
	5.2 Evaluation framework	implementation and review...	
5.3 Harnessing feedback			
6.1 Making processes easier	continuous improvement...		
	6.2 Expanding payment options	continuous improvement...	
6.3 Building strategic partnerships			

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Organising to deliver
A coordinated approach to strategic delivery

A range of roles and responsibilities have been identified to support the successful implementation of the Customer Experience Improvement Strategy across the six objectives:

ALL COUNCIL STAFF

The success of the Customer Experience Improvement Strategy will depend on all Council staff being empowered and taking ownership of what they can contribute, as well as in being conscious and proactive in how they embody the CEIS values, culture and objectives.

CEIS Champion

Chairs and helps set direction with the CEIS Working Group, is the change authority & strategic sponsor for the Strategy.

Dedicated CEIS oversight

To support the Champion

A dedicated resource may be assigned to drive and manage the implementation and support the Knowledge champion

CEIS Working Group

Strategic leads + invitees

Drives and reports on the progress of CEIS strategic objectives, as well as ensuring their alignment.

CEIS WG

Online Services Team

Process improvement team

A culture of collaboration, innovation and evaluation driven by customer-centric design.

Channel strategy team

Reporting & Evaluation team

Customer engagement team

Customer interaction team

External expertise

Council may also benefit from bringing in external expertise to support the development and implementation of key initiatives for which it does not have the capability or capacity.

CEIS Strategic leads

1 lead per objective

Drive and oversee the implementation of strategic initiatives within their stream, across the organisation

Evaluating success

This section presents our overall recommendations for evaluating success of the future strategy over the four horizons of change.

Framework
Applying continuous improvement

To support the implementation of the future Strategy, we propose the following framework for continual evaluation and improvement, and the maintenance of successes.

Define

What is it that we need to improve? Why?
What is the outcome we are trying to achieve?
How will we know if we are successful?

When it works

When it doesn't

Maintain

If it is successful, how can we ensure its maintained?
Who is going to maintain the improvement?
When should it be measured again?

Test & Measure

How can we measure if we have been successful?
What are the key criteria to measure?
What will we do with the data once we have it?
How does this impact the next cycle of improvement?
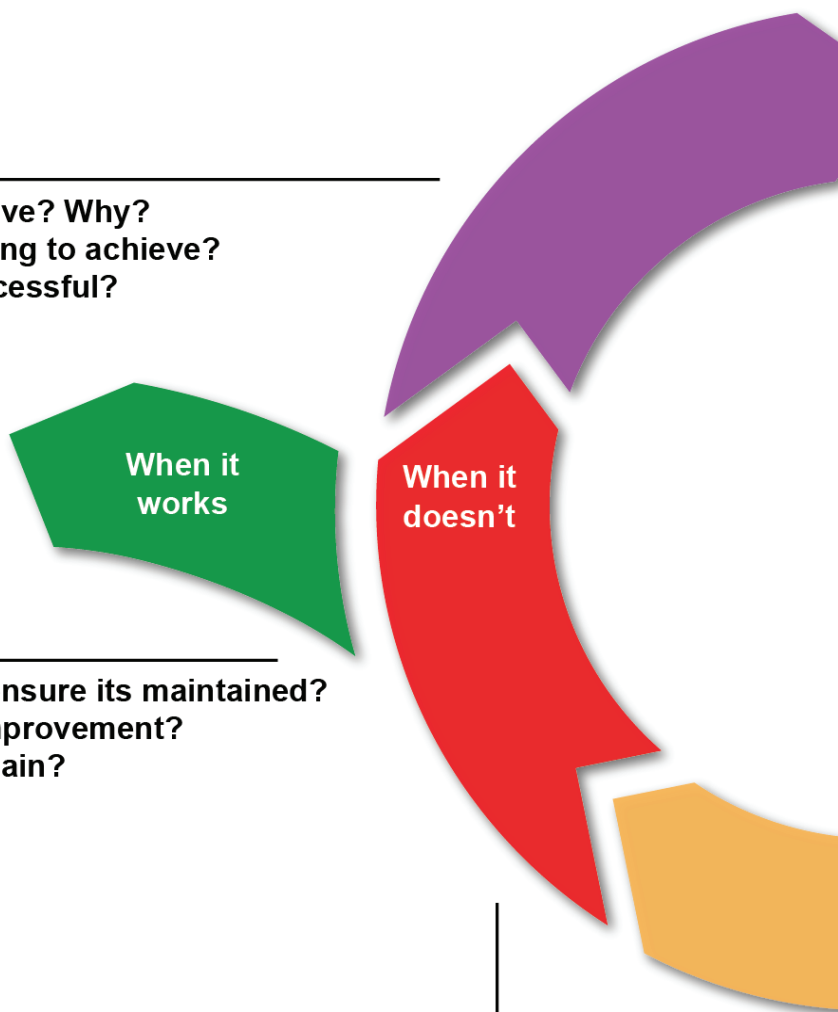
Learn

What is our customer's experience?
What is the data telling us?
What have we learnt in the past?

Ideate

What ideas do we have?
How will it work?
Which is the best way to take this idea forward?

Build

How can we prototype our concepts?
What is the most cost effective way to test our concepts?
How will they be deployed?

Measuring design
How to define effective metrics

Successful experience design balances the needs and desires of the user with what is viable for an organisation to deliver.

In determining effective and meaningful metrics for measuring design solutions (especially where there is no obviously quantifiable or tangible outcome), Council should consider whether its selected metrics are able to be:

1. **Derived from strategic objectives and priorities**

2. **Restricted to a reasonable number of measures so that important data is not lost amongst the unimportant**

3. **Easy to extract and interpret**

4. **Shown to everyone whose actions can affect the results**

5. **Used to promote understanding, learning and improvement.**

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$$\text{ROI} = \frac{Gain}{Investment}$$

(Qual) → (Qual) → (Cost)

The key to effectively calculating ROI on design is to find ways to translate qualitative results into quantitative comparisons and then attribute costs to those quantities.

Measuring the user experience
The validation stack method
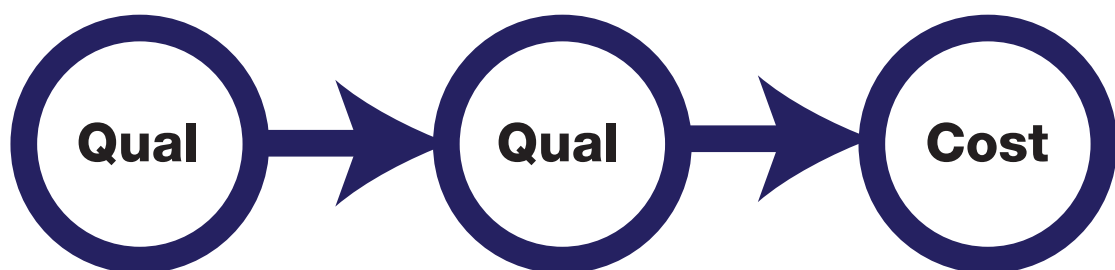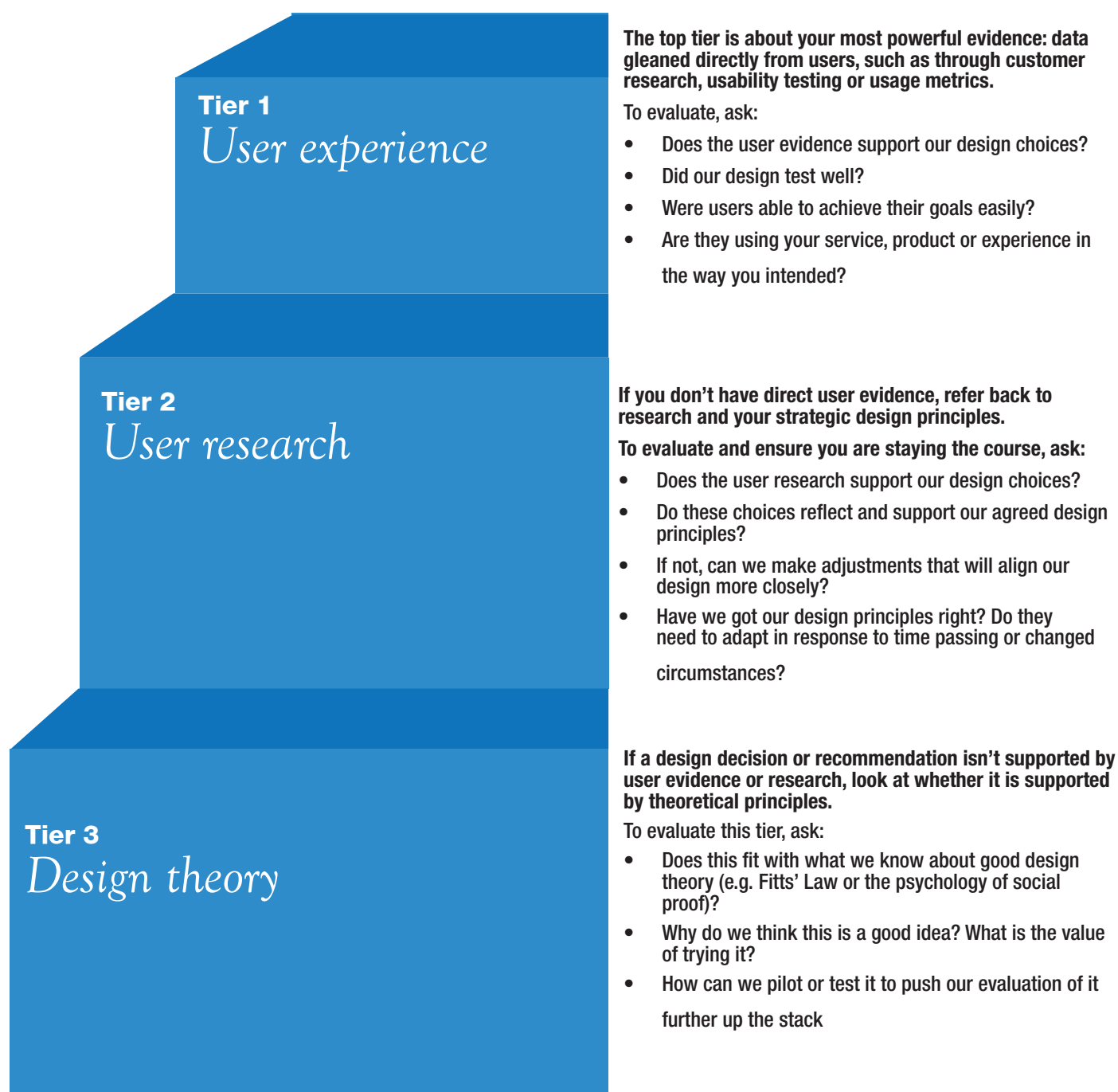
Successful experience design balances the needs and desires of the user with what is viable for an organisation to deliver.

Tier 1
User experience

The top tier is about your most powerful evidence: data gleaned directly from users, such as through customer research, usability testing or usage metrics.

To evaluate, ask:

- Does the user evidence support our design choices?
- Did our design test well?
- Were users able to achieve their goals easily?
- Are they using your service, product or experience in the way you intended?

Tier 2
User research

If you don't have direct user evidence, refer back to research and your strategic design principles.

To evaluate and ensure you are staying the course, ask:

- Does the user research support our design choices?
- Do these choices reflect and support our agreed design principles?
- If not, can we make adjustments that will align our design more closely?
- Have we got our design principles right? Do they need to adapt in response to time passing or changed circumstances?

Tier 3
Design theory

If a design decision or recommendation isn't supported by user evidence or research, look at whether it is supported by theoretical principles.

To evaluate this tier, ask:

- Does this fit with what we know about good design theory (e.g. Fitts' Law or the psychology of social proof)?
- Why do we think this is a good idea? What is the value of trying it?
- How can we pilot or test it to push our evaluation of it further up the stack

People are often surprised to learn of the scientific foundations that underpin good design. Some can be hard to convince, but there is a lot of very solid theory and research that supports the value of a design-driven approach to problem-solving and improvement.

The order of the tiers in the Validation Stack is important. Always choose a "theoretically inferior" design that tests well with users over a "properly designed" alternative, and only lean on theory for support when you have no other data. User-centred design is about learning and evolving in accordance with user behaviour. Their experience should lead your design practice.

And finally, it's important to have the strategic strength and cultural courage to throw away a bad design. Many organisations hold onto bad design because of emotional or resource investment, or a set of erroneous beliefs about its value. If your design isn't supported by user evidence, research, or theoretical principles, throw it away and start fresh.

* The Validation Stack is a concept from Cennydd Bowles' Undercover UX Design *(New Riders, 2010).*

Ten ways to measure design
A framework of useful measures

Each the initiatives proposed in the future Strategy will generate a number of the benefits described below.

1. Behavioural influence

Behavioural influence can be measured qualitatively and quantitatively depending on the design. Look for shifts in customer behaviour, selections, completions and preferences in response to design changes and match them against your desired outcomes

2. Improved usability

The usability of an interface design can be measured by analysing the efficiency of user navigation through observation, click-through, or interviews. All manner of design-based usability issues can be isolated and evaluated through usability testing.

3. Cost savings

This is a good measure for design changes whose value can be easily cost-attributed or measured via traditional financial ratios. Organisations with good design are often stronger on all financial measures from practical, statistical and managerial perspectives.

4. Consistency and response times

Guidelines and standardisation are an excellent way to reduce processing times, errors and costs. Measure standardised performance against past performance against customer satisfaction, response times and resources, especially with other factors constant.

5. Brand image and reputation

Design builds image and this can be measured by reputation gains. Reputation can be difficult to quantify, but qualitatively, you can measure it through awards, awareness, feedback and brand recognition amongst others.

6.

Enables innovation

You can also measure the success of a design in the rate of additional innovations or improvements it leads to, through both the process of ideation itself and the self-building gains that an innovation culture yields.

7.

Developing customer communities

Good design can attract and foster both deliberate and organic customer communities. This is engaging, sticky, and extremely effective. These are easily measured qualitatively through user research and quantitatively through participation metrics.

8.

Creating intellectual property

Another way to measure design's contribution is to consider how much you've lost if it is stolen. If you want to maximise the ROI of your design efforts, consider securing intellectual property protection, and integrating IP-building efforts into design processes.

9.

New markets

This is related to behavioural influence and customer communities, but another indicator of successful design is the creation of, or entry to, new markets, partnerships or user cohorts. Take note of whether new types of customers or partnerships can be linked back to design.

10.

Sustainability

Design can have considerable impact on our environment, and that impact is easily measurable using standard sustainability metrics. This may be a longer term measure of design success, but it is certainly a good return on investment alongside the other benefits.