# Channel Shift Action Plan 2015-17

**Technology & Web Support**

| Ref | Objective | Action | Target | Lead | Update | Date Edited |
|-----|-----------|--------|--------|------|--------|-------------|
| 1.1 | To purchase and implement the new CRM and Self Service System. | 1.1.1 Develop a Specification, Procurement, Purchase, and Implementation. | July 2015 | Scott Webster & Arvato | | |
| 1.2 | To appoint a Web Editor. | 1.2.1 Develop JD & Spec, Report to Cabinet, Advertise, and Appoint. | February 2015 | PR | | |
| 1.3 | To purchase and implement a future proof Content Management System (Website). | 1.3.1 Specification, Procurement, Purchase, and Implementation. | May 2015 | Arvato & PR | | |
| 1.4 | Establish Website Governance & Content Management. | 1.4.1 Develop a draft website strategy and implement website policies.<br>1.4.2 Improve editor training.<br>1.4.3 Implement an editorial style guide. | May 2015 | Web Editor | | |

**Leadership Engagement**

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|-----|-----------|--------|--------|------|--------|-------------|
| 2.1 | All key stakeholders to have knowledge and understanding of why and how the Council will deliver channel shift. | 2.1.1 Deliver presentation/ workshop to CMT.<br><br>2.1.2 Deliver presentation/ workshop to all service areas identified for channel shift. | Mar 15<br><br><br>Ongoing | Scott Webster<br><br><br>Scott Webster | | |

**Channel & Customer Insight**

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|-----|-----------|--------|--------|------|--------|-------------|
| 3.1 | All selected service areas are to collate customer service data. | 3.1.1 Services are to collect customer data using the CSDC tool and/or Customer Service Centre. | Quarterly | Service Managers | | |
| 3.2 | Analyse the customer service data and report to the Executive Board. | 3.2.1 Present findings to the Executive Board, and report back on success of channel shift. | Quarterly | Scott Webster | | |

| 3.3 | Input data into the Business Optimisation Tool to prioritise Lean Reviews. | 3.3.1 Input data into the BOT to identify service costs and value for money. | Annually | Karen Brown | | |
|-----|-----|-----|-----|-----|-----|-----|
| 3.4 | Baseline all web transactions once self-serve capability is in place, and set KPI's. | 3.4.1 Baseline web transactions for first year.<br>3.4.2 Set KPI's to be monitored and reported. | September 2015 | Scott Webster & Service Managers. | | |
| 3.5 | Consult with service users on their requirements to self-serve and satisfaction. | 3.5.1 Establish focus groups containing service users.<br>3.5.2 Use focus groups to critique, test and undertake journey maps of online self-service processes prior to going live.<br>3.5.3 Monitor customer service satisfaction. | April 2015-Ongoing | Scott Webster & Service Managers. | | |

**Process Improvements and Channel Shift Approach**

| Ref | Objective | Action | Target | Lead | Update | Date Edited |
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| 4.1 | Lean all customer service business processes. | 4.1.1 Deliver review. | Ongoing | Karen Brown & Specific Service Area | | |
| 4.2 | Research and adopt channel shift good practice for each service area. | 4.2.1 Attend relevant conferences and visit relevant organisations. | Ongoing | Specific Service Area & Scott Webster | | |
| 4.3 | Services identify appropriate business processes to be provided as online self-service | 4.3.1 Utilise customer service data, business process measurements, good practice, service knowledge and service users' consultation to identify processes. | Ongoing | Specific Service Area & Scott Webster | | |
| 4.4 | Provide a business case for each online self-service process | 4.4.1 Develop an evidence based business case that includes a financial analysis and ROI. 4.4.2 Review the contact channels provided to the customer for the business process. 4.4.3 Develop individual | Ongoing | Specific Service Area & Scott Webster | | |

| | | action plans for the online self-service process, to identify implementation and delivery. | | | | |
|-----|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|------------------------------|--|--|
| 4.5 | All online self-service processes are to be tested by service users. | 4.5.1 See action 3.5.2. | Ongoing | Arvato & Web Editor | | |
| 4.6 | Promote online self-service | 4.6.1 Promote online self-service using the appropriate channel shift tactic per service area. 4.6.2 Review and amend promotional material for service areas. | Ongoing | Specific Service Area & PR | | |