



Digital Experts Programme

Redcar & Cleveland Borough Council live web chat case study

The issue and context

Redcar and Cleveland Borough Council has defined its priorities as growing the local economy and creating more jobs, developing great places to live and improving the quality of life.¹

In the face of the loss of traditional industries, the council recognizes that while the industrial economy remains important, the service sector – particularly the public sector, creative industries and tourism and leisure services – will form a larger part of the economy. Meanwhile the council itself has been hard hit by budgetary cuts and faces further reductions in Government grant by 2020.

Deploying digital technology to enhance the borough's business effectiveness and reduce the cost to serve is therefore a vital objective, as is developing digital skills among both residents and staff. The council has established a corporate improvement programme called 'Enhancing Our Service Offer' to enhance digital skills, promote digital inclusion and provide high quality online information and services, leading to greater levels of self-service by residents.

¹ See [http://www.redcar-cleveland.gov.uk/rcbcweb.nsf/F9B468059775DC7780257934005ADBA2/\\$File/Our%20Plan%202015-17.pdf](http://www.redcar-cleveland.gov.uk/rcbcweb.nsf/F9B468059775DC7780257934005ADBA2/$File/Our%20Plan%202015-17.pdf)

This programme, which was launched in 2012, includes activities to procure new customer relationship and web content management systems, to develop mobile applications and to work with the borough's staff and communities to reduce digital exclusion and promote basic digital skills. It is supported by the council's cabinet members, digital champion and executive management team.

"The Enhancing Our Service Offer' programme started off as a largely stand-alone transformation initiative. But it's now part of our core business." Assistant Director, Redcar and Cleveland BC.

The project objectives and targets

The aim of the Digital Experts project was to contribute significantly to the council's wider digital strategy and ambitions by focusing on four additional work streams:

- The development, introduction and piloting of a 'Live Web Chat' capability as part of the borough's approach to assisted digital and supported self-service
- The delivery of a series of focus groups and engagement sessions with communities, local groups, businesses and partner agencies to further define and develop the council's digital offering and online services
- The introduction of additional ICT development capacity to bring about the changes emerging from the focus and engagement sessions
- The procurement of external quality assurance and advice around security and data matters.

The live web chat element of the project aimed to achieve a number of outcomes, based on the experience of other councils. As well as providing another convenient access channel for citizens, the borough expected to save money by supporting web users to complete their transactions online rather than having them resort to more traditional and expensive forms of contact when they encountered a problem. This would be particularly useful for complex transactions such as Universal Credit and Benefits changes of circumstances.

In addition, the live web chat would also enable the council to manage demand better by allowing staff to handle multiple customer contacts concurrently. And by gathering statistics on web chat usage and through post-chat surveys, the borough would also be able to understand the problems encountered by users of its website and to identify opportunities to develop better website content and automated work flow.

The consultation and engagement sessions would explore citizens' and businesses' current experience of using the website and provide a forum for exchanging views on future developments, as well as providing a clearer picture of local needs for support. The sessions would inform the council's technical and digital services development programme, help shape its strategy for reducing digital exclusion, but also provide a mechanism for continuing engagement with stakeholders throughout the programme.

Finally, Redcar and Cleveland recognised the need for external validation that their data was being handled safely and for residents and businesses to be assured that this was the case, thereby minimizing the risk to the council and overcoming any reluctance to use digital services.

“Perception is really important. People will only use online services if they are convinced they are safe and secure.” Technical Programme Manager, Redcar and Cleveland BC

In the light of these drivers, the project therefore sought to:

- Procure, configure and deploy a web chat system by April 2015 and migrate 3,500 contacts from other channels by 31 March 2016. By applying standard cost per contact figures to the migrated contacts, the council would be able to provide evidence of the cost savings achieved by implementing the system
- Carry out engagement sessions in each of the borough’s wards (22 in total) between May and October 2015, supported by 148 hours of developer time between July and December 2015 to implement the changes identified in the sessions
- Obtain two days of professional advice and assurance relating to security and data arrangements between April and September 2015.

The approach and progress to date

The council had already completed an initial scan of the market by the time the Digital Experts funding was agreed and therefore made rapid progress in procuring and installing its preferred live web chat service. The system was configured, tested internally and launched by late April 2015.

From the outset, the project team collected statistics on the number of web chats offered and handled. Users were also prompted to complete a post-chat survey, which included a question about whether in the absence of the web chat option the resident would have contacted the council by another route. By extrapolating from these figures and applying a combination of Leeds City Council’s web chat cost estimates and Socitm’s standard cost per contact model, Redcar & Cleveland has been able to provide illustrative figures for its likely efficiency gains. The headline figures for the period April 2015 to 31 January 2016 are given below:

Live chats offered	4750
Live chats handled	4153
Percentage handled	87 %
Exit surveys completed	725
Percentage completed (of chats handled)	17 %
Face-to-face contacts avoided ¹	1012
Gross estimated savings (@£8.62 per contact ²)	£8,723.44
Estimated cost of web chat service (@£2.46 per contact ³ x 1012)	£2,489.52
Net estimated savings	£6233.92
Phone contacts avoided ¹	2416
Gross estimated savings (@£2.83 per contact ²)	£6,837.28
Estimated cost of web chat service (@£2.46 per contact ³ x 2416)	£5,943.36
Net estimated savings	£ 893.92
Total net illustrative savings over period April 2015 to 31 January 2016 inclusive	£7,127.84
Email contacts avoided ⁴	445
Web forms contacts avoided ⁴	23
<p>¹ Extrapolated from post-chat surveys on the basis that the returns are an accurate reflection of total live chats handled.</p> <p>² Socitm estimate of cost per contact.</p> <p>³ Calculated by applying Leeds City Council's analysis that web chat is 13 per cent cheaper than handling a telephone call to Socitm's cost per contact for phone calls (see http://www.local.gov.uk/documents/10180/6360115/Leeds+live+chat+case+study+FINAL+-+Copy.pdf/e0533dd3-ae34-4f05-9c85-f5efa71b035e).</p> <p>⁴ For the moment, avoided contacts by email and web forms are not assumed to offer a significant financial saving. The project will investigate this assumption further.</p>	

It is important to note that these figures are illustrative. The actual costs for different contact channels in Redcar and Cleveland may differ from Socitm's averages and Leeds City Council's estimates. The figures do suggest, however, that the council is handling almost 500 web chats each month on average, potentially generating net savings of more than £7,000 over a 10-month period.

The consultation stream within the project has taken longer to realize. Resident engagement was seen as an essential part of designing and developing the council's new customer relationship and content management systems and the engagement timetable was therefore aligned to their original procurement cycle. When this cycle was extended, there was a knock-on impact on the consultation process.

A contract for the new systems was finally agreed in early December 2015 with an implementation date of late March 2016. On the basis of this updated implementation schedule, the community engagement plan (which already existed in draft) was finalised in the period before Christmas and the activities were completed between January and March 2016. Key steps included:

- Booking engagement sessions
- Recruiting participants
- Delivering sessions
- Analysing data
- Delivery of a technical and digital services development programme
- Development of a strategy to reduce digital exclusion.

One important change was to reduce the number of engagement sessions from 22 to six following a mapping exercise to examine the key issues affecting people living in different parts of the borough. This change enabled the project to engage with residents within each of the borough's three main localities and helped the team to gain an understanding of the barriers facing people at locality rather than ward level. It also allowed the borough to shift some of the Digital Experts funding towards additional development in response to the residents' feedback.

When the feedback from the engagement sessions was combined with the results of an extensive digital survey among residents carried out in 2015, as well as some additional street surveys and sessions in local colleges, a number of headlines emerged:

- There is extensive access to broadband in the home (almost 90 per cent of respondents)
- There is an appetite for the development of new channels of access to enable self-service (81 per cent of respondents strongly agreed or agreed with this)
- On the other hand, at the time of the surveys, use of the council website remained limited and there was little interest in interacting with the council through social media
- More than one fifth of respondents felt they needed support to improve their digital skills.

As a result, the borough is continuing to prioritize the redevelopment of its website platform, including its design and content and links to the CRM system. It has also recognized that further work is required to establish how best to support residents to improve their digital skills. Overall, the consultation has underlined the need for the council – like other authorities – to be ever more responsive to its customers about what they want from its services in the future, as the basis for an authority-wide blueprint for customer services.

The final part of the project was to engage an accredited external security assessor to review both the infrastructure related to the council's mobile application platform and the online experience the council intended to create. However, the adviser originally contracted proved unable to come on site in the required timescale and a new supplier had to be sought.

During March 2016, the new contractor carried out penetration testing aimed at evaluating the risk posed by malicious users, employing a combination of both automated tools and manual investigative techniques. The results were very positive and any issues identified have now been addressed. Further work is planned to assess the user's online experience.

The outcome – successes and challenges

In addition to generating significant potential cost savings for the council, the use of live web chat has been enthusiastically welcomed by residents. Of 424 comments received over the period from April 2015 to January 2016, 321 were positive (76 per cent), 68 were neutral and only 35 were negative. The comments offer an insight into why residents value the new service, including its immediacy and flexibility.

"Quick simple and effective"

"Much easier than trying to speak to someone on the phone"

"It's useful to have a printable record of the advice given"

"Needed some information, got it. Very good service"

"It works well for myself as my wife is disabled and I can do things without dragging her out in the bad weather"

"I sorted out two queries in 10 minutes which was much easier than waiting on the phone"

"Really useful and I wouldn't have found the information elsewhere"

"I find live chat so useful as you can usually state things in writing better than saying"

"Awesome service and friendly and very helpful"

"At last a council moving with the times – 21st century"

There have also been other benefits. For instance, the council's customer services representatives have enjoyed working with the new channel and feel it has enhanced their job role and skills.

"We were a bit nervous at the beginning because we'd never used live web chat before. But actually it's made our job more varied and we've found we can easily handle three calls at the same time." Customer services representative, Redcar and Cleveland BC.

Staff have found that web chat offers many practical advantages in their day-to-day work. For instance, rather than going through a lot of detail on the phone, they can send callers a link to information that already exists on the council website. Not only is this a quick and comprehensive way of responding to many queries, it also encourages residents to self-serve in the future.

If for any reason a chat has to be passed across to another customer services representative, that person has all the history of the contact at their disposal and the resident does not have to start again. And the fact that everything is recorded by the system provides a valuable audit trail of the advice that has been offered for both contact centre staff and residents.

“One of the practical benefits has been that you’re able to ask colleagues for advice, which is difficult on the phone without putting the caller on hold.” Operational Customer Services Manager, Redcar and Cleveland BC.

A further advantage of web chat is that system reports and resident feedback can be used to drive improvements in the structure and design of the council’s website. For example:

- Previously, tide times were added on or very close to the beginning of each month. Users asked for this information to be available earlier and, as a result, wherever possible tide times are now updated sooner.
- The link between job adverts and the council’s strategy document, *Our Plan 2015-2017*, was broken. Customer feedback highlighted the problem and users are now able to read the document directly from job adverts. A note has also been added to the *Our Plan* page reminding team members to update the link from job adverts.

There are some limitations. For instance, it is not currently possible to pass chats directly across to specific officers in key service departments, meaning that residents may have to be referred back to the council switchboard. One unanticipated cost arose from the need to buy an additional licence (an increase from five to six) to allow web chat administration to take place without affecting service delivery. However, the borough’s overall experience has been very positive.

“By implementing web chat we’ve been able to push people towards a cheaper channel but at the same time we’ve had no dip in customer satisfaction”. Assistant Director, Redcar and Cleveland BC

The other work streams (engagement, development and security assurance) had a more extended implementation timetable than originally anticipated. In both cases, they were affected by the council’s wider programme of change, involving both the procurement of major new systems and a move towards mobile applications.

As other councils have also found, it can be difficult to recruit the right mix of residents to focus groups and a wider mix of engagement approaches is likely to be required. In addition, security and data assurance are particularly ‘hot’ topics at present and the advisers with relevant skills are in high demand – a factor that may have contributed to the delay in getting a consultant on site.

Key learning points

- The involvement of a wide range of staff from the ICT and web teams, the service areas and the contact centre, supported by senior management, was crucial in ensuring a smooth implementation for the web chat system. Customer services representatives spent time developing templates of standard information for typical queries. Although the process was time-consuming, the templates proved very effective. During the testing phase, colleagues were also encouraged to send queries to each other, which helped build understanding of the system and confidence in the new approach.
- Redcar and Cleveland also thought carefully about how to promote web chat to residents. The new facility was publicized on the home page of the council website on the day it went live and the team had their first chat within minutes. The invitation to use web chat now appears on almost all the council's web pages. Instead of accepting the standard image of a customer services representative that came with the system, the council ran an 'X-Factor' process within the contact centre and a picture of one of the staff now features on the site. The council also chose to reject the option of having web chat 'pop-ups' appear to residents as this was judged to be too intrusive.

The screenshot shows the website for Redcar & Cleveland Council. At the top, there is a navigation bar with links for HOME, SITE MAP, CONTACT US, and RSS. The main header features the council's logo and the text "this is Redcar & Cleveland". Below the header is a search bar with the placeholder text "Enter key words here and click search" and a "Search" button. A secondary navigation bar includes links for Home, Resident, Business, The Council, Visit, and Contact Us. The "Contact Us" link is highlighted. Below the navigation bar, there is a "TIDE TIMES" link and an "A-Z INDEX" section with buttons for each letter of the alphabet. The main content area is divided into three columns. The left column, titled "In this section", lists various services: A-Z, Branch Sites, Help, Maps, Search, Site Map, and Social Media. The middle column, titled "Contact Us", contains text explaining how to contact the Customer Service Team via Live Chat or by phone. It also includes a section titled "Our Customer Service Standards" with a graphic showing numbers 1 through 5. The right column, titled "Online Services", lists services such as "Apply for it", "Pay for it", "Report it", "Request it", and "Have your say", each with an icon. Below the "Contact Us" text, there is a "LIVE CHAT" section with a photo of a staff member and text stating "Our friendly team are available now".

- Finally, the approach that Redcar and Cleveland has taken underlines the fact that establishing a good system of data capture and measurement at the outset of a project can significantly improve a council's ability to demonstrate improvements in both performance and financial efficiency. Feedback from users on both the content and navigation of the website is particularly valuable as a way of highlighting problems to be addressed.

Next steps

The council sees live web chat as an important part of its wider digital offering and would like to make it available to more staff in customer-facing roles and in locations such as libraries. The borough is also investigating options for making web chat more accessible via the mobile devices that many residents now use in their daily lives.

In the longer term, Redcar and Cleveland is looking to improve the links between customer contact and service delivery, with an increasing emphasis on encouraging resident self-service. The plan therefore is to integrate web chat facilities into the council's new customer portal and CRM system, so that both residents and staff can instantly gain access to relevant, personalized information, such as the current status of outstanding jobs.

Contact for further information

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