

Appendix A: Digital Customer Strategy update report – March 2025

Introduction

The Digital Customer Strategy was adopted by the council in December 2023 and aims to put the customer first by improving user experience and ensuring customer needs guide service development and delivery. This strategy is vital for delivering customer-focused services, emphasising the importance of a culture of excellent customer and digital service, digital equality, and efficient processes. This report provides an update on the progress made towards achieving the goals outlined in the strategy. A detailed action plan for 2025/26 is provided in Appendix B.

Work carried out prior to the adoption of the Customer Digital Strategy

Prior to the adoption of the Digital Customer Strategy by members, officers had carried significant work to prepare the authority for an ambitious digital transformation programme, this work included:

- **Work carried out prior to December 2023 included:**
 - Rollout of Microsoft 365 to all staff
 - Reduction of mailbox sizes to reduce the amount of individual data being held by staff and files stored in Outlook.
 - The creation of a SharePoint site for council members
 - The commissioning of audits into Digital equality in Exeter and Data use at the City Council.
 - The creation of a Gateway to agree non-standard service requests submitted to Strata our IT Service Solutions and Transformation company.
 - Bring Your Own Device (BYOD) process developed and rolled out to testers in Strategic Management Board (SMB) / Operational Management Board (OMB).
 - Improvements to the Contact Us form on the ECC website allowing customers to select from a list of common enquiries. The customer's query is then directed to the appropriate service for action; or the customer is directed to a webpage containing the information and forms to address their enquiry.
- **Goals and Outcomes:** The strategy set out ten goals covering all elements of digital customer service, with detailed outcomes and priority actions for each goal as laid out in Appendix A.



Ten goals for the Digital Customer Strategy

- **Consultation Process:** The strategy was developed with input from various stakeholders and a public consultation, which included an online survey and outreach to ensure broad participation.
- **Consultation Feedback:** Feedback from 451 completed surveys showed strong support for the strategy, with most respondents emphasising the importance of professional customer service and a single point of contact.
- **Customer Experience Research:** RedQuadrant was engaged to assess the council's customer experience maturity and provide recommendations for enhancing customer intelligence and addressing digital exclusion.
- **Key Findings:** The research identified fragmented customer interaction data, the need for clearer governance, and the importance of digital inclusion, with 10-15% of residents facing digital access barriers.
- **Recommendations:** Recommendations in the proposal include developing a customer intelligence model, investing in digital inclusion, and linking employee experience to customer experience.

Key Achievements since Customer Digital Strategy adoption in December 2023.

1. Creation of dedicated Customer and Digital Teams

New bespoke Customer and Communities, and Digital and Data teams have been created within the People and Communities Directorate; new Heads of Service were recruited in November 2024 with

additional staffing resources being recruited in Spring 2025 a Consultation and Engagement Manager, Project Manager and Data Analyst. These teams are working with Strata our IT service solutions and transformation company and are focused on delivering the Digital Customer Strategy and the adopted Strata business plan.

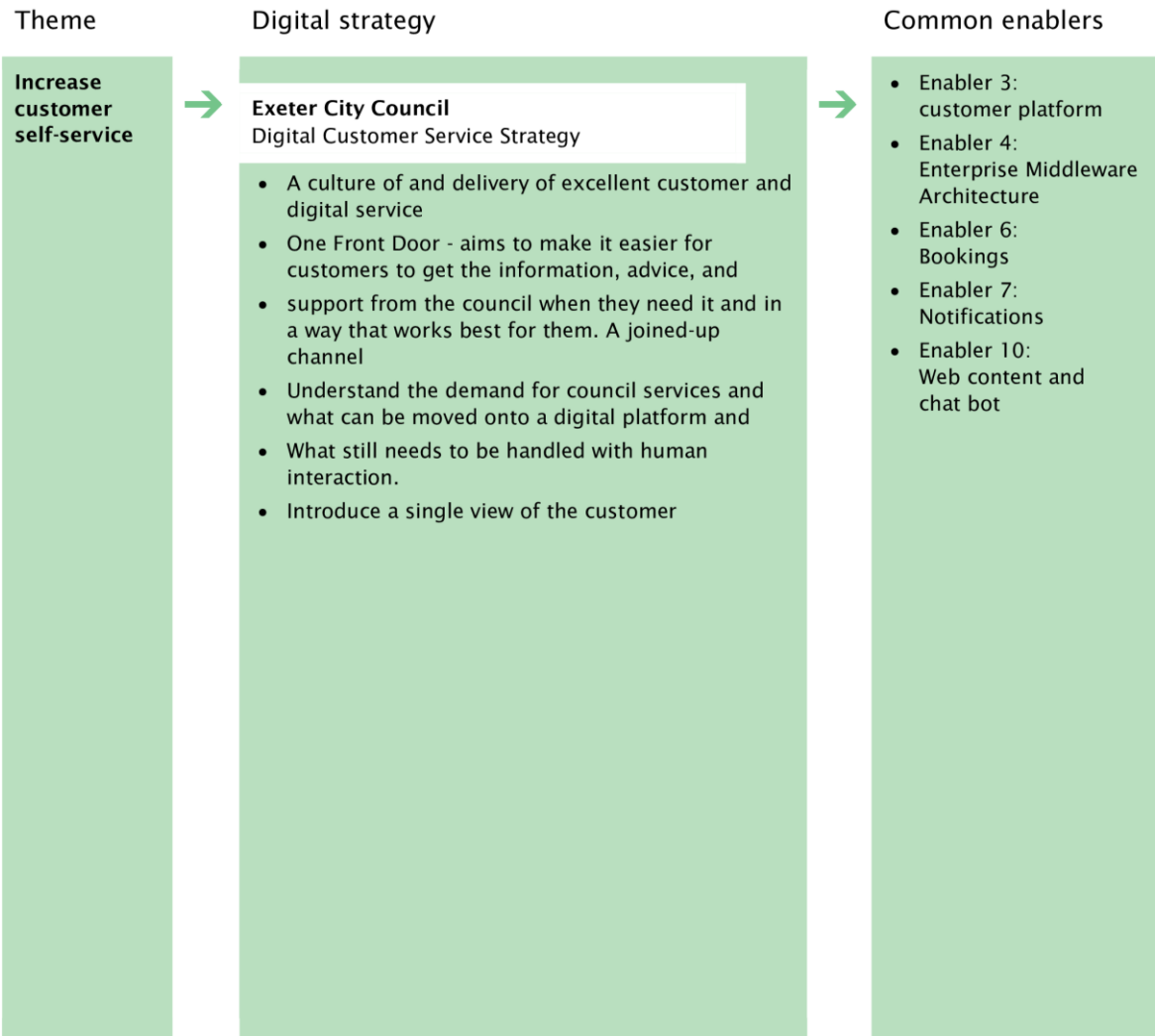
2. Adoption of the Strata Business Plan

Members through the Strata Joint Executive Committee and Full Council approved the business plan for 2020/25, this document was written by Strata to cater for a diverse range of audiences and sought to align the vision of the 3 councils involved and outlined key enablers to deliver the council's digital aspirations, drive change and efficiency.

The key enablers identified in the Strata Business Plan are:

- **Enabler one: introduce new end user computing model:** This enabler focuses on transforming the working experience for users by introducing a new end user computing model (i.e., new laptops). It aims to enable native functionality on Windows laptops, gradually phasing out the need for VMware Horizon virtual desktops. Users will have direct access to Office 365 applications, including Outlook, Teams, and Skype for Business, as well as files in OneDrive and SharePoint.
- **Enabler two: contact centre and telephony:** This enabler involves the implementation of a new telephony and contact centre system across the Strata partnership. The system aims to create a seamless customer experience by providing efficient and integrated communication channels.
- **Enabler three: CRM and forms:** This enabler focuses on the implementation of a Customer Relationship Management (CRM) system and forms to improve customer interactions and streamline processes, in the case of Exeter this will include the launch of MyExeter, a digital one-stop shop for council services.
- **Enabler four: Enterprise Middleware Architecture (EMA):** The EMA serves as a crucial layer in modern IT environments, enabling seamless integration and communication between various applications, systems, and databases. It aimed to future-proof integrations and reduce the impact of replacing back-office systems.
- **Enabler five: SharePoint:** SharePoint is identified as a key enabler for secure and efficient management and retrieval of documents. It meets strategic objectives such as good data management, compliance with legislation, and obligations like the Department of Works and Pensions (DWP) Memorandum of Understanding (MoU).
- **Enabler six: Bookings:** This enabler involves the implementation of a booking system to streamline and manage appointments and reservations effectively.
- **Enabler seven: Notifications:** This enabler focuses on enhancing the notification system to provide timely and relevant updates to customers and staff.
- **Enabler eight: Power Platform:** The Power Platform enabler aims to leverage Microsoft's Power Platform to create custom applications, automate workflows, and analyze data, thereby improving efficiency and productivity.
- **Enabler nine: Data Platform:** This enabler involves the development of a robust data platform to support data-driven decision-making and improve data management practices.
- **Enabler ten: Website Content and Chatbot:** This enabler focuses on enhancing website content and implementing a chatbot to improve customer engagement and provide instant support.

Within the business plan examples have been provided how the council's aspirations can be met by common enablers that can be embedded into its digital program, for example:



Theme

Digital strategy

Common enablers

Single point of contact



Exeter City Council Digital Customer Service Strategy

- One Front Door – Customers can contact us easily via a single point of contact. Staff use joined up technology so they can view a Single Customer Record to handle the majority of customer enquiries, avoiding the need to hand off to others.



- Enabler 2: contact centre and telephony
- Enabler 3: CRM and Forms
- Enabler 4: Enterprise Middleware Architecture
- Enabler 3: CRM and Forms
- Enabler 6: Bookings
- Enabler 7: Notifications
- Enabler 10: Web Content and Chatbot

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Enabling staff

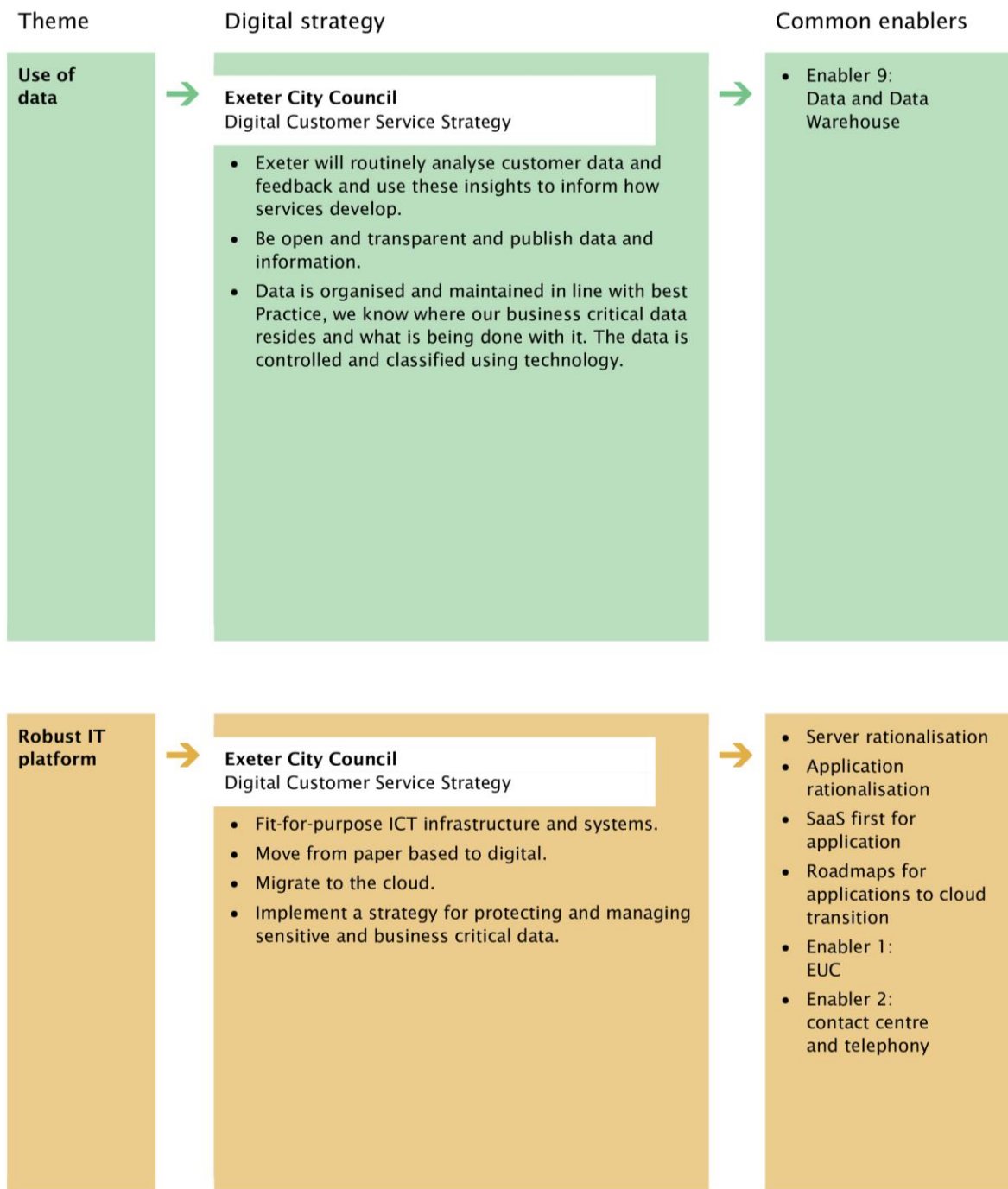


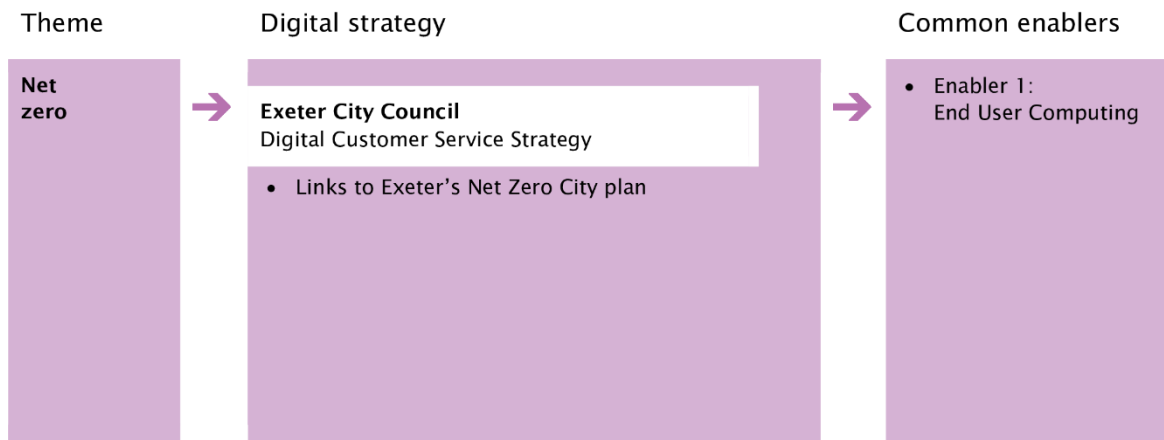
Exeter City Council Digital Customer Service Strategy

- Streamline process, automating routine steps. Remove Paper transactions, Explore use of AI.
- Provide staff with access to continuously improving digital technology.
- Equip staff with the necessary digital skills.
- Provide equipment needed to perform.



- Enabler 1: End User Computing
- Enabler: four Enterprise Middleware Architecture
- Enabler 5: SharePoint
- Enabler 6: Bookings
- Enabler 7: Notifications
- Enabler 8: Power Platform





The updated Business Plan for 2025/26 builds upon the foundations of the first plan and its key enablers – Contact Centre, End User Computing, SharePoint migration, Middleware and Cyber Security enhancements and emphasises the importance of continuing to develop these to sustain a strong and resilient ICT service. The plan highlights the ongoing improvements to IT and systems which will enable a move to cloud-based systems which will replace the need for physical server rooms across the council estate. The move from Skype to Teams telephony and preparing to move lines from analogue to digital services.

Exeter City Council has committed significant sums to its capital program to help deliver this plan. Further information can be found in section 10. The enablers are supported by the council and underpin the transformation work it is carrying out to improve customer service.

3. Launch of MyExeter

One of the significant milestones achieved is the launch of MyExeter, the council's new digital front door. MyExeter went live in January 2025, starting with the Garden Waste subscription service. This platform aims to provide a seamless and user-friendly experience for customers, allowing them to access various council services online. The initial feedback from users has been positive and plans for a dedicated communications plan to encourage sign-up are underway with the Communications team and to further expand the services available through MyExeter during 2025.

4. Digital Workshops and Training

To ensure that staff and members are well-equipped to deliver excellent customer service, several digital workshops have taken place, and more are planned for 2025. For example, the Extended Leadership Team participated in a variety of workshops, which focused on the digital customer service strategy, its outcomes and the collection of data for the new Corporate Performance Framework. Additionally, Beyond Teams sessions are planned for all staff in March 2025. These sessions aim to enhance digital knowledge and skills, enabling staff to better use the new digital tools available to them. A newsletter updating staff and members on the improvements taking place is planned to be rolled out from March 2025.

5. Development of a Customer Charter

The Customer Services team is in the process of developing a Customer Charter, which will be developed with input from Councillors and customers during 2025. The Customer Charter will outline the standards customers can expect across all services, ensuring a consistent and high-quality customer experience and will provide data on areas for improvement as part of the Corporate Performance Framework across all service areas. This initiative is part of the broader effort to foster a culture of excellent customer service within the council.

6. Telephony and Contact Centre Solution

In 2023/2024 the published telephone numbers and email addresses across the website were reviewed and rationalised to ensure that customers were presented with a simple, easy to understand journey that promoted our One Front Door approach.

As of February 2025, all staff have transferred from Skype to Teams telephony, with control of administration such as routing, in-call messaging and opening hours now sitting with Customer Services. Customer Service staff will transfer to Teams in line with the implementation of the new Contact Centre platform in late Spring 2025.

The new contact centre solution, Nice CX One, was procured in December 2024 across the Strata partnership and is scheduled to go live in Exeter in Spring 2025. This solution will enhance the seamless customer experience by providing efficient and integrated communication channels. Implementation will be phased, with each phase delivering measurable business and customer benefits, such as delivering a single omnichannel solution, (chat, telephony, online etc, in a single solution), and developing use cases for Artificial Intelligence (AI) to assist agents in achieving effective outcomes for customers.

Progress on Digital Customer Strategy Goals

The Digital Customer Strategy outlines ten goals, each with specific actions and measures of success. The following sections provide an update on the progress made towards achieving these goals:

A. A Culture of Excellent Customer and Digital Service

The council has made significant progress in fostering a culture of excellent customer and digital service. Briefings on the digital customer strategy are planned for all staff, highlighting expectations and how they can contribute through behaviours, systems, and ways of working. A newsletter will shortly be launched to update all staff on the progress of the strategy, and Teams awareness sessions are scheduled to begin in Spring 2025.

B. Digital Equality

In September 2023 work was commissioned to develop a city-wide picture of digital inequality and make recommendations around addressing this. This area is one of the priority themes of Exeter's Community Grants programme. In addition, the Equality, Diversity, and Inclusion (EDI) improvement plan has the training of staff, to increase staff knowledge and awareness of the Equality Duties as a key outcome. EDI and accessibility are ongoing themes within design and delivery of services to residents.

C. Efficient Processes

The council is committed to streamlining processes to enhance efficiency and improve the customer experience. The implementation of the new telephony and contact centre solution is a key step in this direction. Additionally, efforts are being made to simplify and automate various processes, reducing the time and effort required to access services.

Projects are currently underway in the City Development, Parks and Open Spaces, and Waste Management services to review processes, content on the website and look at ways that digitalisation will enable us to enhance the service we offer to residents.

For example, the project aims of the City Development transformation project are:

- To enable City Development to deliver the outcomes in the Digital Customer Strategy and be an exemplar of excellent digital and customer service delivery, by collaborating with national initiatives and integrating best practice.
- To create an approach and methodology for how we will systematically transform frontline services across the council, in line with the outcomes of the Digital Customer Strategy.

The Rapid Impact Team has brought in a small group of experts from RedQuadrant working alongside the operational managers in Parks and Open Spaces, and Waste Management to undertake a rapid assessment of current processes, use of line of business systems; operating models and performance within each service and benchmark this against best practice models and the councils aspirations in the Digital Customer Strategy and the potential deployment of the Strata enablers as set out for digital transformation.

Both of these projects will be delivering their initial feedback in April 2025 with actions plans for each to be created and a work programme for delivery to be determined.

D. Joined-Up Channels

The strategy emphasises the importance of providing joined-up channels for customer interactions. MyExeter is a significant step towards achieving this goal, offering a single platform for accessing multiple services. Plans are in place to integrate additional services into MyExeter, further enhancing the customer experience, the processes chosen have been from usage data and quick wins.

To compliment the garden waste process which was the first process to be added to MyExeter services from the Waste Management service will the next ones to be added:

Process	Demand / Usage
Bin Reminders	4,735 current subscribers
Bulky Waste Collections	2,096 annual collections
Order a New or Replacement Bin	4,187 cases per annum

Report a missed bin	10,672 cases (9,602 online, 1,957 via Customer Services, 1,070 via Bartec)
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Quick wins are those processes with high demand and by adding these to MyExeter will help customers to track the progress of their enquiry which will remove the need to contact the council via other communication channels:

Process	Demand / Usage
Allotments	590 cases per annum
Car Park Season tickets	516 cases, 634 tickets per annum

A full communications plan for MyExeter is being developed by the Communications Team which will help us promote the service to residents, businesses, and tenants.

E. Secure Data

Ensuring the security of customer data is a top priority for the council. Measures have been implemented to safeguard data and protect customer privacy. Regular audits and assessments are conducted by Strata to identify and address potential vulnerabilities, this includes the completion of the Cyber Assessment Framework (CAF) which is a tool designed to help the council and Strata to achieve and demonstrate cyber resilience for its critical functions.

The CAF consists of objectives, principles, outcomes, and indicators. The framework will be used to assess the extent to which cyber risks to essential functions are being managed. The CAF involves several key aspects:

- **Decision Making:** Ensuring that security management is led and supported at the senior level, with evidence such as minutes, job descriptions, and regular reviews of security information from Strata.
- **Governance:** Formal governance of cyber/IT security, including evidence of meetings and outcomes, and ensuring that security practices are directed towards council staff and Strata where required.
- **Risk Management:** Having a risk policy and evidence of its review, recording security risks, and ensuring that risks are communicated to key risk owners in the council and Strata.
- **Assurance:** Providing assurance that the governance and resulting outcomes from the cyber approach are delivering within the council's risk appetite.

Staff training on data security has been provided to ensure that all employees are aware of best practices and protocols. We have recently carried out a phishing test of all staff to assess the level of staff compliance with policy and to understand colleagues' awareness of potential phishing emails. The test involved sending a phishing email to all staff users at an agreed time.

The test highlighted the need for further training and awareness among staff to prevent such incidents in the future. Technical controls put into place by Strata to protect the council, including the use Mimecast and Microsoft E5, which would have quickly spotted a mass campaign and blocked it after the first few clicks.

Further training on cyber security and tests will take place at regular intervals.

F. Digital Collaboration

The council recognises the importance of digital collaboration in achieving its goals. Efforts are being made to foster collaboration both within the council and with external partners. The digital workshops and Beyond Teams sessions are examples of initiatives aimed at promoting collaboration and knowledge sharing. The City Development Transformation Programme, HR Improvement Plan and Rapid Impact Project which is looking at services in Parks and Open Spaces, and Waste Management are examples of initiatives currently underway in the council where improvements to processes, web processes and practices are being made. These proof-of-concept projects can be used as templates to make further improvements across the rest of the council. Sharing of best practice across the councils that make up the Strata partnership continues to take place and is actively encouraged.

G. Enhanced Digital Knowledge and Skills

Building digital knowledge and skills among staff and members is crucial for the success of the strategy. A training programme is planned for delivery in 2025 to provide tailored training to meet the specific needs of different roles. This programme is intended to equip staff with the skills required to deliver a first-class customer service and effectively utilise digital tools and technologies.

H. Customer-Centric Design

The strategy emphasises the importance of designing services with the customer in mind. Feedback from customers is being actively sought through improvements to the website to seek advice and discussions with the new Consultation and Engagement Manager on ways we can implement this into our business as usual and once in place it can be used to inform the design and improvement of services. The development of the Customer Charter is a key initiative in this regard, ensuring that customer expectations are met and exceeded.

I. Continuous Improvement

The council is committed to continuous improvement in its digital customer service. Regular reviews and assessments are conducted to identify areas for improvement and implement necessary changes. The progress report on the strategy is an example of the council's commitment to transparency and accountability.

J. Sustainable Digital Transformation

Sustainability is a core principle of the Digital Customer Strategy. Efforts are being made to ensure that digital transformation initiatives are sustainable and have a positive impact on the environment. The council is exploring ways to reduce its carbon footprint through the use of digital technologies and processes.

Within the Strata Business Plan 2025-2026 several initiatives aimed at reducing carbon emissions and promoting sustainability have been added. This includes upgrading to more energy-efficient equipment and optimising energy use in existing systems. Strata plan to implement a system to monitor and report on its carbon footprint. This will help track progress and identify areas for improvement. The plan includes

initiatives to engage employees in sustainability efforts. This involves training and awareness programmes to promote eco-friendly practices, and they plan to work closely with us to align sustainability goals and share best practices.

Investment and Budgets available for the Digital Customer Strategy

In 2023/24 the council invested capital of £288,989 in support of the emerging Customer Digital Strategy. A further £1,139,340 was approved for investment in 2024/25 to support the delivery of the Enablers within the Strata Business Plan. For 2025/26 Council plans further capital investment of £452,758.

REVENUE COSTS	21/22	22/23	23/24		24/25
	Actual	Actual	Actual		Actual (up to qtr 3)
	£	£	£		£
Strata Contract for ECC	1,951,686	2,107,677	2,331,835		2,129,833

Conclusion

The Digital Customer Strategy has made significant progress since its adoption in December 2023. The creation of dedicated capital funding for this strategy, bespoke Customer and Communities and Digital and Data teams in the council's new structure, the launch of MyExeter, digital workshops, and procurement of a new telephony and contact centre solution are some of the key achievements. The council remains committed to enhancing customer service through digital transformation and is on track to achieve the goals outlined in the strategy. Ongoing efforts to address digital inequality, promote digital collaboration, and build digital knowledge and skills will ensure that the strategy continues to deliver positive outcomes for residents and staff alike.

Andrew Hopkins, Head of Service, Digital and Data
Stephen Clayton, Head of Service, Customer and Communities
March 2025.