Appendix B: DIGITAL CUSTOMER STRATEGY ACTION PLAN - MARCH 2025	Authors: Andrew Hopkins and Stephen Clayton.		
AGREED ACTIONS	PRIORITY ACTIONS	PROGRESS REPORT	PROPOSED DELIVERY DATES
Goal 1. A culture of excellent customer and digital service			
Our staff and members understand our digital customer service strategy and its outcomes. These inform the design of their work, putting customers and digital at the forefront of everything we do.	We will run awareness (cultural change) sessions on our digital customer strategy for all staff, highlighting and explaining expectations and how they can contribute through behaviours, systems and ways of working.	Digital workshops and workshops on collecting data for the new Corporate Performance framework have been held with Extended Leadership Team. 3 x Beyond Teams sessions for all staff held in March. Further training will be scheduled. Bespoke newsletter to update all staff to begin April 2025.	June 2025
Our members and staff have the knowledge and skills to plan, resource and deliver a first-class customer service.	We will provide a programme of training tailored to the needs of staff and members.	Programme will be scheduled in April 2025 to be rolled out during May/June 2025.	June 2025
Our organisational structure and the allocation of our resources enable our digital and customer service outcomes.	We will ensure that this vision and mission is embedded into our organisational change plans.	Bespoke Digital and Data and Customer and Communities teams created in restructure in 2024, with Heads of Service appointed.	Completed
Goal 2. Digital equality			

Members and staff understand the scope and scale of digital inequality in Exeter, and we work with communities and partners to address digital exclusion and inequalities so that everyone can benefit from digital opportunities.	We will commission a report from experts to get insight and data to better understand digital inequality in Exeter. We will implement a plan to address the issues that we discover. We will increase our training around disabilities and diversity to help our staff deal with all customers more effectively.	RedQuadrant were commissioned to look at Digital Equality and a report was presented to council in September 2023 Within the Red Quadrant report were several recommendations these included: The use of community grants programme to promote digital inclusion. Money from the Neighbourhood CIL was set aside for a digital inclusion project. However, due to a downturn in the CIL forecast this is not currently in the pipeline for 2025/26 and we will need to review how we deliver this. An EDI Project Plan has been created with a dedicated EDI Officer and a training programme being developed as an outcome.	December 2025
<mark>**Goal 3. Excellent customer and digital services**</mark>			
We understand what excellent digital services means to our customers and we meet these standards.	We will publish a Customer Charter setting out the standards that customers can expect across all our services, monitor our performance and continuously improve.	The new Consultations and Engagement Manager will be working on this during 2025.	October 2025
We listen to customers to improve existing services and to design excellent new services.	We will routinely analyse customer, data and feedback and use this insight to ensure to inform how services develop.	New mechanisms to receive feedback on our website and online processes to be added in April 2025, these will be analysed by the Customer Services and Digital Teams to make relevant improvements.	April 2025 and on-going - progress to be reported annually
The customer experience is improved by the use of virtual assistance technology (also known as a digital assistants) which answer questions and process	We will work with recognised industry experts to identify how we can use virtual assistance in our digital services and learn from proofs of concept to ensure we understand the business and customer benefits prior to wholescale change.	Within the Strata business plan are enablers (notifications, website, chatbots, enterprise middleware architecture, CRM and forms) all of which will enable improvements to be made. These improvements will start to improve the service during 2025.	On-going - progress to be reported annually

simple and routine tasks without human intervention.		Chatbot project to commence in Spring 2025.	October 2025
Customers receive pre-emptive and proactive communication, which keeps them updated about issues, appointments and progress so they don't need to contact us.	We will explore and test out how we can use digital channels e.g. email, text, chat, apps for proactive communication and make content and information available in formats that are accessible to all.		
Customers can keep track of their requests to the council and access frequently used services and information by logging into their customer account.	We will assess the ongoing requirements for, the business benefits of, and the advantages for customers of customer accounts and implement the optimum solution.	MyExeter our online digital front door was launched at the end of January 2025 with Garden Waste subscription as the first service, additional services will be added through 2025. First phase of promotion for MyExeter	On-going - progress to be reported annually June 2025
When customers or members raise an issue or problem with a council service this is managed efficiently and effectively and escalated to a formal complaint if not resolved.	We will continue to review our contact us/complaints process to ensure that the digital solution is working effectively for customers.	The Customer services and Digital Teams are working to improve the service provided. Improvements will be made through 2025 including a revision of the current complaints process.	November 2025
Goal 4. Prioritised, joined-up channels			
The majority of customer enquiries and transactions are handled through digital channels and demand for other forms of contact (face-to-face, telephone and email) is continually reducing and is mainly for specialist or complex enquiries.	We will design services, so that digital becomes the channel of choice, providing staff with the time and skills to deal with specialist and more complex enquiries.	Work to deliver this change with the launch of MyExeter has begun, our new digital front door for the council. The removal of email addresses and (where appropriate) from web pages has taken place. First phase of promotion for My Exeter.	On-going progress to be reported annually June 2025

Our contact centre offers a choice of channels, but the relevant information follows the customer across channels and interactions, so we retain the full history and context of customers' enquiries.	We will assess the capability of our line of business and customer relationship management systems, to deliver a seamless customer and staff experience.	A telephony and contact centre solution has been procured and will go live in Spring 2025.	June 2025
Our single customer services function with the knowledge and skills to resolve enquiries at the first contact point across all channels, with the ability to enable customers to easily access specialist support.	We will Design services so that customers get to the right place, first time. Train staff to gain the skills, to resolve enquiries at the first point of contact and, where this is not possible, to efficiently enable customers to the right place/person.	An ongoing programme to improve our processes has begun, initially with the Rapid Improvement Team projects in the Operations Directorate due for reporting by May 2025 with project in City Development, due to report in Sept 2025. Both will inform the wider organisational development plan to be produced by September 2025.	September 2025
Customers can contact us easily via a single point of contact without having to navigate multiple, complex contact points.	We will Increase the proportion of contact handled by our professional contact centre function Reduce the number of published contact routes Enhance our online 'Contact Us' and central telephony services, to simplify and improve the user experience Join up services for a seamless customer experience.	Reducing published contact routes and first phase of 'Contact Us' completed. Multiple links to Contact Centre Project, My Account, Rapid Improvement and City Development Projects	Phase 1 complete Linked projects by December 2025
Staff use joined-up technology so that they can view and update a single customer record to handle the majority of customer enquiries and review records of customer	We will upgrade the capability of our customer contact systems to deliver a seamless customer and staff experience.	A telephony and contact centre solution has been procured and will go live in Spring 2025. Phase 1 implements the new solution	Phase 1 June 2025 Phase 2

		Phase 2 Omnichannel functions and AI	December 2025
Goal 6. Accessible information			
All customers can serve themselves on any device by finding, or being directed to readable, accessible, accurate and up-to-date online information.	We will: Redesign the content of our website to ensure that our published digital information is readable, accessible, accurate and up-to-date Improve our staff's knowledge and skills in writing readable (Plain English) digital content and accessibility requirements Publish and implement a Data Strategy.	A programme to revise and update the website, including a reduction in the number of templates and new home page, included an improved A-Z search facility is planned for 2025.	On-going progress to be reported annually
We will be open and transparent and publish data and information. Performance is regularly reported to the public to ensure that citizens are informed of the quality of services being delivered.		City Development the first service to fully review and update its pages and content. Data Strategy will be considered by Executive in April 2025.	June 2025 April 2025
Goal 7. Efficient processes			
The number of processes is reduced, or they are streamlined, paperless and automated so that it's simple for customers to complete a transaction (apply for something, pay for something, book something) and more efficient and cost effective for the council.	We will: Start with the customer when reviewing and designing our processes Ensure our processes are as effective and efficient as possible by automating routine steps and removing inefficient manual (human) processing Aim for processes that are automated from beginning to end Remove paper transaction and communication Explore the use of artificial intelligence, robotics and digital signatures and develop proofs of concept.	An ongoing programme of process improvement continues, this is initially focussed on the City Development service. Programmes for the Operations, Waste Management and HR services are planned for Spring 2025. Both will inform wider Organisational development plan to be produced by September 2025.	September 2025
Goal 8. Fit-for-purpose ICT infrastructure and systems			

Our staff and members have access to continuously improving digital technology, with the kills and confidence to use it well, helping them deliver great services to residents as efficiently as possible.	We will work with Strata, our ICT partner, and our partner Councils, to create a plan for ICT that enables the goals of our Digital Customer Service Strategy and our three essential principles.	Strata plans to improve the ICT infrastructure by transitioning from analogue to digital systems and migrating to the cloud. This will involve implementing digital collaboration tools and shared data platforms to enhance internal and external communications, as well as developing a detailed implementation plan for a cross-council roll-out of Microsoft 365.	December 2025
Our ICT infrastructure and systems operate in line with our essential principles: Move from analogue to digital Migrate to the cloud Introduce a single customer platform.		Cloud (Azure) Business Case has been agreed within Strata Partnership with transitional implementation plans proposed to be begin Summer 2025.	
Goal 9. Well-maintained and secure data			
Our systems and data are secure and protected from cybersecurity breaches and unauthorised sharing.	We will: work with Strata our ICT partner to ensure that our systems are regularly tested to identify any vulnerabilities and mitigate any risks	Strata will ensure that systems are regularly tested to identify any vulnerabilities by conducting routine security assessments and audits.	On-going progress to be reported annually
Customers are confident that any information provided to the council will be kept safe and secure.	Ensure staff are aware of our information security policies and procedures and how to mitigate the risks of cyber security breaches.	They plan to mitigate the risks of cyber security breaches by implementing robust security measures and continuously monitoring for potential threats.	
We use data to review and continuously improve our digital services.	We will implement a strategy for protecting and managing sensitive and business critical data so that:	A data strategy will be considered for adoption by Executive in April 2025.	
Our data is organised and maintained in line with best practice.	We know where our business critical and sensitive data resides and what is being done with it. We have control of this data as it travels inside and outside of the council We use technology to classify, label, and protect this data		

	We use our data to inform decision making and improvement.		
Goal 10. Digital collaboration			
As a Microsoft 365 house we will use digital collaboration tools to work effectively internally and with customers and partners to promote more open communications and making use of shared data and digital platforms.	We will compile a detailed implementation plan for a cross-council roll out of Microsoft 365, which optimises the opportunities for breaking down silos and using tools to achieve our digital customer service goals.	Strata and the Digital and Data team continue to work on a cross-council roll-out of Microsoft 365 and provide staff and members with the tools to achieve the digital customer service goals.	On-going progress to be reported annually