Customer Service Excellence

The Government Standard

Project Document V1.2

CUSTOMER SERVICE EXCELLENCE

UK

The Government Standard

Contents

1. Introduction

The Government wants public services that are efficient, effective, excellent, equitable and empowering – with the citizen always and everywhere at the heart of public service provision. With this in mind Customer Service Excellence has been developed to offer public services a practical tool for driving customer-focused change within their organisation.

The foundation of this tool is the Customer Service Excellence standard which replaces the previous Charter Mark Standard and tests in great depth those areas that research has indicated are a priority for customers, with particular focus on delivery, timeliness, information, professionalism and staff attitude. There is also emphasis placed on developing customer insight, understanding the user's experience and robust measurement of service satisfaction.

Customer Service Exellence is designed to operate on three distinct levels:

1. As a driver of continuous improvement. By allowing organisations to self assess their capability in relation to customer focussed service delivery, identifying areas and methods for improvement.

2. As a skills development tool. By allowing individuals and teams within the organisation to explore and acquire new skills in the area of customer focus and customer engagement, thus building their capacity for delivering improved services.

3. As an independent validation of achievement. By allowing organisations to seek formal accreditation, demonstrate their competence, identify key areas for improvement and celebrate their success.

Customer Service Excellence provides public services with a practical tool for developing a customer focused culture. It is recognised that in the new delviery landscape such providers can come from the public, private and third sectors. No restrictions on eligibility have been imposed, those organisations in the UK that want to achieve Customer Service Excellence through formal assessment, whether they are in the public, private or third sectors, are able to do so.

A total of 57 criteria divided into five catogories make up the Customer Service Excellence standard. A comprehenive list can be found in **APPENDIX 1.** The five catogories are:

1. Customer Insight
2. The Culture of the Organsiation
3. Information & Access
4. Delivery
5. Timeliness & Quality of Service

For an organisation to gain Customer Service Excellence accreditation it must have been assessed to have met no less than 46 of the criteria in full and no more than 11 criteria in part. Accreditation cannot be achieved if any criterion are assessed to be non compliant. The Council will be assessed against the criteria across all corporate

areas and services. The assessment will measure the Council's performance in respect of external and internal customers.

2. Background

The Council has committed to achieving Council wide Customer Service Excellence accreditation by 31st March 2011. A number of factors influenced the Council to make this decision. These factors have been detailed below.

2.1 Vision, Values, Aims

In 2009 the Council announced its vision for the future:

We will make South Cambridgeshire a safe and healthy place where residents are proud to live and where there will be opportunities for employment, enterprise and world-leading innovation. We will be a listening Council, providing a voice for rural life and first class services accessible to all.

In support the Council has committed to four organisational values each identified as a key factor in the successful realisation of the vision. These values are:

1. Trust
2. Mutual respect
3. Customer service
4. Commitment to improve services

Underpinning the vision and values are five Council aims. These aims are:

1. being a listening council, providing first class services accessible to all
2. ensuring that South Cambridgeshire continues to be a safe and healthy place for you and your family
3. making South Cambridgeshire a place in which residents can feel proud to live
4. assisting provision for local jobs for you and your family
5. providing a voice for rural life

Each Council aim is supported by a number of approaches and actions.

2.2 Place Survey 2008

In 2008 CELLO MRUK Research conducted the Place Survey on behalf of South Cambridgeshire District Council. The Place Survey is a statutory exercise that Central Government has specified must be undertaken every two years. The survey has been designed to capture local people's views, experiences and perceptions, so that any proposed solutions and interventions for an area reflect local views and preferences.

Results of the survey were positive in the main with the Council scoring exceptionally high for most national indicators. The vast majority of residents (90%) were satisfied with their local area as a place to live (NI5) with a third (35%) stating that they were very satisfied.

Conversely fewer than one in two residents (44%) were satisfied with the way South Cambridgeshire District Council runs things. This is lower than the average

satisfaction for all district councils in Cambridgeshire at 48% and the National average (all authorities) of 46%. In 2006/07 BVPI 57% of residents were satisfied with the way the Council runs things, signifying a major 13% decrease in satisfaction.

2.3 Annual Audit & Inspection Letter

In 2009 the Council received its Annual Audit and Inspection Letter. The report provides an overall summary of the Audit Commission's assessment of the Council. It draws upon the previous Comprehensive Performance Assessment, the findings and conclusion from the audit of the Council for 2007/08 and from any inspections undertaken since the last Annual Audit and Inspection Letter.

The report is complimentary of the improved Contact Centre performance and complaints handling training but also comments:

"Progress on customer services projects and service accessibility has been slower than planned."

"The quality of customer services remains variable"

2.4 Equality Framework For Local Government

In 2009 the Council achieved level 2 of the Equality Standard for Local Government. The standard has subsequently been replaced by the Equality Framework For Local Government which has three tiers of accreditation: Developing, Achieving & Excellence. The Council is committed to securing Achieving accreditation in 2010.

The Equality Framework For Local Government reflects a number of key priorities and actions detailed in the Customer Service Excellence standard.

2.5 Financial Resources

The Council is under continued pressure to reduce spending and find efficiency savings year on year. At the same time the Council maintains its commitment to provide first class services that are accessible to all. Working under these constraints it is more important than ever to look at new and innovative ways to improve service whilst reducing resources.

An organisation that places the customer at the heart of service design and delivery understands customer characteristics and priorities and is better positioned to allocate resources effectively and efficiently.

2.6 Service First Steering Group

The corporate Service First Steering Group comprises representatives of the Council's five service areas; Affordable Housing, Community & Customer Services, Health & Environmental Services, New Communities, Planning & Sustainable Communities.

Amongst other objectives the group is committed to developing, supporting and reinforcing a culture of customer service excellence throughout the organisation. It has also committed to support and improve customer insight and engagement to inform corporate objectives and service plans. The group has analysed a number of options to support these and other commitments and has recommended the

Customer Service Excellence standard be used to drive customer focused cultural change throughout the Council.

3. Business Case

A signed business case document and project initiation document can be found in **APPENDIX 2** and **APPENDIX 3.**

The Council has indentified customer service and a commitment to improving services as key values to support the Council's vision. The Service First Steering Group has recognised the need for a driver to assist the Council in achieving its commitments and has further identified the Customer Service Excellence standard as that driver.

In June 2009 a large section of Council services undertook a self-assessment against the Customer Service Excellence standard. A comprehensive set of results can be found in **APPENDIX 4**. The results indicated the level of customer service varied in each corporate area and in some cases service to service. The Service First Steering Group undertook analysis of the results and concluded that a Council committed to Customer Service should provide a consistent service across all areas of the Council.

Whilst meeting some of the 57 critera will involve new ways of working for the Council, a proportion will directly contribute to other Council priorities, projects and drivers detailed in section two.

3.1 Customer Benefits

The customer will benefit from a truly customer focused organisation that places the public at the heart of service design and delivery by:

- Developing an in-depth understanding of the characteristics of our current and potential customer groups and using this information to better serve the customer and their preferences.

- Making consultation with customers integral to continually improving our service and advising customers of the results and action taken.

- Analysing customer journey mapping to improve understanding of how customers interact with the Council and making improvements to reduce barriers and increase access.

- Making information about the full range of services we provide available to our customers and potential customers, including how and when people can contact us, how our services are run and who is in charge.

- Evaluating how customers interact with the organisation through various access channels will ensure the Council is providing accessible services to all

- Giving staff training and guidance to handle complaints and to investigate them objectively will improve the customer experience and complainant satisfaction.

- Promptly sharing customer information with colleagues and partners within our organisation whenever appropriate reducing unnecessary contact for customers.

3.2 Organisational Benefits

The organisation will gain a range of benefits by working towards the Customer Service excellence standard. These will include:

- Improved customer insight by gaining a greater understanding of our customers, their characteristics and priorities. This will enable the Council to increase efficiency and effectiveness by allocating resources to customers' needs.

- Increased customer consultation will assist the Council in its aim to be a listening Council. It will provide further opportunity for customers to share their opinions and in turn could increase performance against National Indicator Four – Percentage of people who can influence decisions in their locality. Increased consultation will also provide valuable feedback that can be used to shape future service delivery.

- The implementation of customer journey mapping will help the Council to ensure customer contact methods are efficient. Removing unnecessary barriers and steps could result in efficiency savings.

- Improved availability and range of information will be of benefit to the customer but could also reduce significant amounts of officer time.

- Improved communication and joined up working practices between corporate and service areas will improve customer service and bring the organisation together as one.

- Providing a consistent service throughout the Council could increase customer satisfaction and further improve Council reputation.

- Placing the customer at the beginning of service design will increase the ability of the Council to get it right first time.

3.3 Project Options

The Council considered three options of working towards the Customer Service Excellence standard. These options were considered on the amount of value that each would bring to the customer and Council.

1. Seek Council wide formal accreditation
2. Seek formal accreditation by specific service area
3. Use Customer Service Excellence without seeking formal accreditation

The Council concluded that option one, to seek Council wide formal accreditation, would bring the most benefit to the customer and organisation. Formal accreditation would emphasise the importance and priority of the project and would give the Council the benefit of external assessment. Council wide accreditation was deemed

essential to ensure a consistent service and fully embedded customer focused culture.

A challenging deadline for achievement of the Customer Service Excellence standard has been set, 31 March 2011.

4. Project Objective

The Council will measure the success of the project on the following objective:

1. Achieving Council Wide Customer Service Excellence accreditation by 31 March 2011.

The project objective will be measured through external assessment and verification.

5. Project Outcomes

Working towards Customer Service Excellence will bring the following outcomes:

- An in-depth knowledge of our customer groups, understanding their characteristics, needs and preferences.

- Customer consultation central to service design and delivery.

- Customer insight used to inform policy and strategy.

- Customer focus prioritised at all levels of the organisation.

- Improved range, content and quality of verbal, published and web-based information.

- The ability to demonstrate that the Council delivers it promises to customers and that outcomes are positive for the community.

- The Council consults and involves customers, citizens, partners and staff on the setting, reviewing and raising of our local standards.

- Improved customer satisfaction levels.

- Increased joined up working resulting in further efficiency savings.

- Improved staff morale.

- Further improved Council reputation.

- The ability to demonstrate the Council's commitment to its vision, values and aims.

6. Project Scope

The scope of the project is clear and concise:

All service areas of the Council will work towards achieving the Customer Service Excellence standard by 31 March 2011 by meeting and evidencing the 57 criteria contained in the standard.

The scope of the project includes work that contributes towards meeting and evidencing the 57 Customer Service Excellence criteria.

7. Assumptions & Constraints

7.1 Assumptions

The Customer Service Excellence project has been structured and planned based on the following assumptions:

- The Council, its officers and Members are committed to the Council's vision, values, aims, approaches and actions.

- The Service First Steering Group budget for 2009/10 & 2010/11 remains at £12,300 PA and is available specifically for this project.

- Members, Senior Management Team and Executive Management Team are committed to achieving Customer Service Excellence by 31 March 2011.

- Provision is made for 18.5 hours of the Customer Service Coordinator role to project manage the project.

- Provision is made for a Project Support Officer for 18.5hrs a week and this cost to be allocated outside of the Service First budget.

- The Service First Steering Group becomes the Customer Service Excellence Project Group, with the sole focus on the achievement of the project.

- Members of the Customer Service Excellence Project Group are committed to acting as project leads within their corporate / service areas.

- The Customer Service Excellence project is given a Council-wide top priority for 2010/11.

- Council services will have enough finances to continue with and implement new activities essential to meeting and evidencing the Customer Service Criteria.

7.2 Constraints

Year on year the Council faces further constraints on its resources. A list of project related constraints have been detailed below:
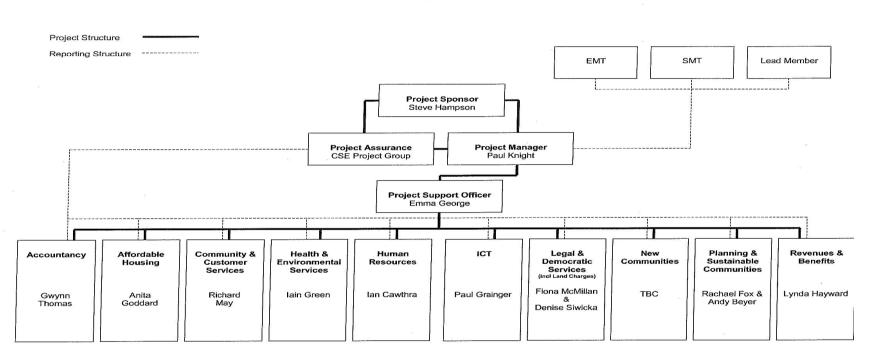
- The combined Service First Steering Group Budget for 2009/10 & 2010/11 is £24,600. No further financial resources have been allocated to the project.

- A Project Manager has been allocated for 18.5 hours per week throughout the project.

- A Project Support Officer has been allocated for 18.5 hours per week throughout the project.

- Organisational capacity. Financial and staff resources are under severe pressure. The organisation will need to manage its many priorities effectively.

- The Council has committed to achieving the Customer Service Excellence Award no later than 31 March 2011.

8. Project Working Documents V1.2

**(The following documents are working documents and
subject to change through the agreed decision making processes)**

8.1 Management Structure V.1.2 – 26.02.10

V.1.2

Project Structure ———————

Reporting Structure - - - - - - - - -

EMT	SMT	Lead Member

Project Sponsor
Steve Hampson

Project Assurance
CSE Project Group

Project Manager
Paul Knight

Project Support Officer
Emma George

Accountancy Gwynn Thomas	**Affordable Housing** Anita Goddard	**Community & Customer Services** Richard May	**Health & Environmental Services** Iain Green	**Human Resources** Ian Cawthra	**ICT** Paul Grainger	**Legal & Democratic Services** (incl Land Charges) Fiona McMillan & Denise Siwicka	**New Communities** TBC	**Planning & Sustainable Communities** Rachael Fox & Andy Beyer	**Revenues & Benefits** Lynda Hayward

8.2 Roles & Responsibilities V.1.2 – 26.02.10

Role	Responsibility
Project Sponsor	To assume ownership of the project and to ensure the project is on course to deliver the agreed business benefits. Responsibilities will include; Championing the project, commitment of project resources, provision of overall guidance and direction to the project, ensuring it remains within any specified constraints, review of each completed stage and approval of progress to the next, approval of major changes.
Project Assurance Group	To monitor project progress including; the monitoring of the business case, business risks and expenditure; monitoring the use of standards and the quality of products; ensuring the end product will meet the original specification.
Project Manager	Responsible to the Project Sponsor for managing the project on a day to day basis. Responsibilities will include; planning & monitoring of the project, risk management, change management, providing highlight reports to the Customer Service Excellence Project Group, EMT and Portfolio Holder, identify and obtain any support and advice required for the management, planning and control of the project.
Project Support Officer	Responsible to the Project Manager with responsibility for providing project and admin related support to the Project Manager and Work Stream Leaders. Further responsibilities will include; the organisation of work stream documentation, arrangement of project meetings, monitoring progress of the work streams, working with the Project Manager to organise the pre and final assessment.
Work Stream Leader	Work Stream Leaders are responsible to the Project Sponsor. Responsibilities will include; the formation of a work stream project group, providing monthly highlight reports to the Customer Service Excellence Project group, securing Corporate Area commitment, meeting and evidencing the 57 Customer Service Excellence Criteria.
Policy & Performance Representative	The Policy and Performance Representatives will attend Work Stream meetings to provide a corporate input and in-depth knowledge of the Customer Service Excellence Standard.
Work Stream Members	Work Stream Members are responsible to the Work Stream Leaders. Responsibilities include; supporting the Work Stream Leader in the meeting and evidencing of the Customer Service Excellence Criteria, championing the project within their service areas, accepting delegated tasks and involving service areas to complete tasks and actions.

8.3 Timeline V.1.2 – 26.02.10

PROJECT NAME: Customer Service Excellance Standard V1.2

ID	Task Name	2009 Nov	Dec	2010 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
S1	**ORGANISATIONAL PREPARATION**																		
1.1	Getting Started Workshop																		
1.2	Self Assessment																		
1.3	Customer Journey Mapping Segmentation Workshops																		
1.4	Customer Service Excellence Awareness Seminars																		
1.5	Getting Ready Workshop																		
1.6	Corporate Evidence																		
S2	**MEETING, EVIDENCING & REVIEWING CRITERIA**																		
2.1	Community & Customer Services																		
2.2	Affordable Housing																		
2.3	Planning & Sustainable Communities																		
2.4	Revenues & Benefits																		
2.5	New Communities																		
2.6	Health & Environmental Services																		
2.7	ICT																		
2.8	Human Resources																		
2.9	Accountancy																		
2.10	Legal & Democratic Services																		
2.11	Documentary Review																		
S3	**PRE ASSESSMENT, GAP ANALYSIS & CORRECTION**																		
3.1	Pre Assessment																		
3.2	Gap Analysis & Correction																		
S4	**ASSESSMENT & VERIFICATION & CORRECTION**																		
4.1	On Site Assessment																		
4.2	Final Feedback Meeting																		
4.3	Professional Report																		
4.4	Decision																		
4.5	Accreditation																		
S5	**PROJECT REVIEW & ONGOING CERTIFICATION**																		
5.1	Project Review & Ongoing Certification Options Meeting																		

8.4 Work Plan V.1.2 – 26-02-10

Stage	Activity	Responsibility	Target Completion Date	Progress	Comments
S1	**ORGANISATIONAL PREPARATION**				
1.1	Getting Started Workshop EMT / Service Managers	PK / EG	Jan 10		
1.2	Self Assessment All Services	EMT/ Service Managers	Mar 10		
1.3	Customer Journey Mapping / Segmentation Workshop EMT / Service Managers (3 workshops x 12 places)	PK / EG	Feb 10		
1.4	Customer Service Excellence Awareness Seminar All Staff (9 seminars x 60 places)	PK / EG	Feb 10		
1.5	Getting Ready Workshop EMT / Service Managers	PK / EG	Mar 10		
1.6	Work Stream – Corporate Services	PK	Mar 10		
S2	**MEETING, EVIDENCING & REVIEWING CRITERIA**				
2.1	Work Stream – Community & Customer Services	RM	24 Sep 10		
2.2	Work Stream – Affordable Housing	AG	24 Sep 10		
2.3	Work Stream – Planning & Sustainable Communities	AB / RF	24 Sep 10		
2.4	Work Stream – Revenues & Benefits	LH	24 Sep 10		

2.5	Work Stream – New Communities		24 Sep 10		
2.6	Work Stream – Health & Environmental Services	IG	24 Sep 10		
2.7	Work Stream – ICT	PG	24 Sep 10		
2.8	Work Stream – HR	IC	24 Sep 10		
2.9	Work Stream – Accountancy	GT	24 Sep 10		
2.10	Work Stream - Legal & Democratic Services	FM / DS	24 Sep 10		
2.11	Documentary Review All Work Streams	PK	01 Oct 10		
S3	**PRE-ASSESSMENT, GAP ANALYSIS & CORRECTION**				
3.1	Pre Assessment All Work Streams	PK	15 Oct 10		
3.2	Gap Analysis & Correction All Work Streams	PK/PH/SH/GJ/ PB/JM/DR	18 Dec 10		
S4	**ASSESSMENT & VERIFICATON**				
4.1	On Site Assessment All Work Streams	PK	21 Jan 11		
4.2	Final Feedback Meeting	PK	28 Jan 11		
4.3	Professional Report	CS	28 Jan 11		
4.4	Decision	CS	04 Feb 11		

4.5	Accreditation All Work Streams	CS	18 Feb 11		
S5	**PROJECT REVIEW & ONGOING CERTIFICATION**				
5.1	Project Review & Ongoing Certification Options Meeting	PK	25 Feb 11		

8.5 Milestones V.1.2 – 26-02-10

Milestones	Scheduled Finish	Baseline Finish	Actual Finish	Finish Variance	Notes
Stage 1 - Organisational Preparation Complete	31 Mar 10	28 Feb 10			
Stage 2 - Meeting, Evidencing & Reviewing Criteria Complete	01 Oct 10	01 Oct 10			
Stage 3 - Pre Assessment, Gap Analysis & Correction Complete	31 Dec 10	31 Dec 10			
Stage 4 - Assessment & Verification Complete	18 Feb 10	18 Feb 10			
Stage 5 - Project Review & Ongoing Certification Complete	25 Feb 10	25 Feb 10			

8.6 Risk Management V.1.2 26.02.10

Risk No	Risk Description	Probability H/M/L	Impact H/M/L	Owner	Countermeasures	Action Date	Status (Open/Closed)
01	Organisational Capacity	M	H	PK	Ensure project work is conducted efficiently and effectively and in partnership.	Ongoing	Open
02	Other Council Priorities	H	H	PK	The Council prioritise the Customer Service Excellence standard, & free capacity from other projects.	Ongoing	Open
03	Service First Budget Inadequate	L	H	PK	Ensure the budget is managed closely. Budgeting will be reported through the agreed mechanisms.	Ongoing	Open
04	Limited Member or officer buy in.	M	H	PK	Awareness Seminars for all staff & Members. Training sessions for Executive and Service Managers.	Mar 10	Open
05	Poor performance in the pre assessment check leading to demoralisation.	L	M	PK	Present feedback in a constructive manner. Plan positive actions.	Oct 10	Open
06	Assessment failure leading to demoralisation.	L	M	PK	Present feedback in a constructive manner. Plan positive actions.	Feb 11	Open
07	Organisational restructure including deletion of posts.	H	M	PK	Ensure all communication is carefully considered.	Mar 10	Open
08	Limited project management and support resources	H	H	PK	SMT resource allocation.	Ongoing	

8.7 Issue Log V.1.2 26.02.10

Issue No	Type	Description	Date Identified	Author	Resolution	Last Updated	Status (Open/Closed)
01	I	EMQC have not provided confirmation of Assessor Costs.	Jan 10	PK	EMQC have been asked to provide costs no later than Monday 01 Feb 2010. (RESOLVED)	26 Feb 10	Closed
02	I	Contacting the Assessor has proved difficult with prolonged periods of no contact at all.	Jan 10	PK	All written communications will be followed up with a verbal communication. (RESOLVED)	26 Feb 10	Closed
03	R	To combine tasks 1.2 and 2.1 as detailed in the Work Plan V1.1. To extend the duration of stage 1 of the project to March 31 2010.	Feb 10	PK	Approve change request or add additional project resource.	26 Feb	Closed
04							
05							
06							
07							
08							

Type: I = Issue or Question, R= Request for Change

9. Project Controls & Reporting

9.1 Highlight Reporting

The Customer Service Excellence Project Group will meet on the following dates:

18 Dec 09	03 Sep 10
29 Jan 10	24 Sep 10
26 Feb 10	29 Oct 10
26 Mar 10	26 Nov 10
30 Apr 10	17 Dec 10
28 May 10	28 Jan 11
25 Jun 10	25 Feb 11
30 Jul 10	25 Mar 11

The Project Manager will use the Highlight Report Template found in **APPENDIX 5** to report progress to the Customer Service Excellence Project Group at each meeting. Work Stream Leaders will also report the progress of their respective areas of work, using the Work Stream Highlight Report Template found in **APPENDIX 6**

A quarterly highlight report will be provided to the Executive Management Team and the Lead Member for Customer Service on the following dates:

Executive Management Team	Lead Member
Apr 10	Apr 10
Jul 10	Jul 10
Oct 10	Oct 10
Jan 11	Jan 11
Apr 11	Apr 11

N.B Exact dates have yet to be scheduled.

9.2 Stage Reviews

Five stages in the project have been identified:

Stage 1. Organisation Preparation
Stage 2. Meeting, Evidencing & Reviewing Criteria
Stage 3. Pre Assessment, Gap Analysis & Correction
Stage 4. Assessment & Verification
Stage 5. Project Review & Ongoing Certification

The Stage Review is a mandatory control point at the end of each stage identified above. The Project Sponsors assessment approves the work to date and authorises the project to move to the next stage. Five stage reviews have been scheduled at the following Customer Service Excellence Project Group meetings:

Stage 1 Review	29 Jan 10
Stage 2 Review	24 Sep 10
Stage 3 Review	18 Dec 10
Stage 4 Review	25 Feb 10
Stage 5 Review	25 Mar 10

9.3 Change Control

It is inevitable that during the course of the project changes will need to be made. Changes will be classed as either major or minor and each has their own process.

Major Changes

Where major problems affect the ability to deliver products or affect the amount of resources required, or the requirements need to change, the Request for Change Template in **APPENDIX 7**should be used.

The project member suggesting the change should complete the first section of the form. It includes sections for "Description of Change" and also an "Expected Benefits" statement, which should provide justification for this change.

The second section "Impact Analysis", should be completed by the Project Manager, after consultation with the relevant stakeholders. Major changes requests should be made at the nearest Customer Service Excellence Project Group meeting, and must be approved by the Project Sponsor.

Minor Changes

Minor Changes are those that are easy to accommodate and do not result in a need to increase resources or extend the timescale of the project. In the case of minor changes, the Project Manager should be consulted, who will assess the impact before approving the change. Minor changes should form part of the highlight report to the Customer Service Excellence Project Group.

9.4 Project Issues

As part of control there must be a procedure that caters for possible deviations from specification. These deviations occur for many reasons:

- The User's requirement changes
- Government legislation changes and the product's specification must be revised to accommodate these changes
- During the development extra features suggest themselves for inclusion
- There are organisational or business changes which alter the scope and objectives of the project
- A question arises on whether the Supplier can meet a particular part of the specification or acceptance criteria

Apart from deviation possibilities, the project requires an avenue for questions and/or concerns. The Issue Log found on page 18 will be used to record all questions, problems, concerns and suggestions. The Issue Log will ensure all issues are considered and responded to. Any subsequent action or changes to the project must be approved through agreed change controls detailed above.

An updated Issue Log will be reported to the Customer Service Excellence Project Group at each meeting.

10. Project Resources

10.1 Staffing

The project will require the following staff resources:

Qty	Role	Work Days
1	Project Sponsor	16
1	Project Manager	130
1	Project Support Officer	130
7	Work Stream Leaders	25
28	Work Stream Members	15
5	Policy & Performance Representatives	15

The project will require an estimated total of 946 workdays over a 16 month duration.

10.2 Financial

The project will require the following financial resources:

Qty	Product	Unit Cost	Total Cost	Budget
1	Getting Started Workshop	£600.00	£600.00	SF
9	CSE Awareness Sessions	£200.00	£1800.00	SF
1	Getting Ready Workshop	£600.00	£600.00	SF
2	Documentary Review	£600.00	£1200.00	SF
1	Pre-Assessment	£3300.00	£3300.00	SF
1	Initial Assessment Meeting	£300.00	£300.00	SF
1	Formal Assessment	£2700.00	£2700.00	SF
1	Final Feedback Meeting	£300.00	£300.00	SF
1	Professional Report	£600.00	£600.00	SF
1	Meeting Criteria	£11200	£11200	SF
All prices exclude VAT			**£22,600**	

The project has been allocated a budget of £22,600 sourced from the combination of the 2009/10 and 2010/11 Service First budget.

11. Assessment Services

The Cabinet Office has approved four assessment centres for Customer Service Excellence:

- Centre for Assessment Ltd
- Customer Service Excellence Assessment Services
- SGS UK Ltd
- EMQC Ltd

On Friday 23 October 2009 the Council interviewed each assessment centre who were asked to present the following:

1. A method of assessment that supports the Council's commitment of Council wide accreditation of the Customer Service Excellence Award by 31 March 2011.

2. An assessment schedule that supports the Council's commitment of Council wide accreditation of the Customer Service Excellence Award by 31 March 2011.

3. What support can the Council expect whilst working towards the Customer Service Excellence Award.

4. Case studies of other Local Authorities you have worked with in relation to the Customer Service Excellence Award.

5. A detailed quote for the assessment of South Cambridgeshire District Council against the Customer Service Excellence Award.

After due consideration the Council appointed EMQC Ltd to conduct the assessment.

EMQC Ltd is one of the UK's leading organisational improvement assessment and business consultancy companies. Working in partnership with the Government they help deliver stringently monitored accreditation services for high quality, performance-enhancing national standards including Investors in People and Customer Service Excellence.

The Council's appointed assessor is Christine Smart.

EMQC have worked and are working with a number of comparable organisations including:

- Oxfordshire County Council
- Fenland District Council
- Rotherham Metropolitan Borough Council
- Darlington Borough Council
- Downs District Council
- Newry & Mourne District Council

12. Project Contact List

Name	Role	Telephone	Email
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Emma George	Project Support	01954 713151	Emma.George@scambs.gov.uk
Paul Howes	CSE PAG Vice Chair	01954 713351	Paul.Howes@scambs.gov.uk
Richard May	Work Stream Leader (CCS)	01954 713366	Richard.May@scambs.gov.uk
Anita Goddard	Work Stream Leader (AH)	01954 713040	Anita.Goddard@scambs.gov.uk
Lynda Hayward	Work Stream Leader (R&B)	01954 713084	Lynda. Hayward@scambs.gov.uk
Andy Beyer	Work Stream Leader (PSC)	01954 713204	Andy.Beyer@scambs.gov.uk
Rachael Fox	Work Stream Leader (PSC)	01954 713173	Rachael.Fox@scambs.gov.uk
TBC	Work Stream Leader (NC)	TBC	TBC
Ian Cawthra	Work Stream Leader (HR)	01954 713452	Ian.Cawthra@scambs.gov.uk
Paul Grainger	Work Stream Leader (ICT)	01954 713294	Paul.Grainger@scambs.gov.uk
Gywnn Thomas	Work Stream Leader (ACC)	01954 713074	Gywnn.Thomas@scambs.gov.uk
Fiona McMillan	Work Stream Leader (LEG & DEM)	01954 713027	Fiona.McMillan@scambs.gov.uk
Denise Siwicka	Work Stream Leader (LC)	01954 713222	Denise.Siwicka@scambs.gov.uk
Georgina Hayward	Communications	01954 713289	Georgina.Hayward@scambs.gov.uk
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13. Appendix

1 – Customer Service Excellence Criteria
2 – Business Case Document
3 – Project Initiation Document
4 – Self Assessment Results
5 – Highlight Report Template
6 – Work Stream Highlight Report Template
7 – Request for Change Template

APPENDIX 1

1	CUSTOMER INSIGHT
1.1	**CUSTOMER IDENTIFICATION**
	Element
1.1.1	We have an in-depth understanding of the characteristics of our current and potential customer groups based on recent and reliable information.
1.1.2	We have developed Customer Insight about our customer groups to better understand their needs and preferences.
1.1.3	We make particular efforts to identify hard to reach and Disadvantaged Groups and individuals and have developed our services in response to their specific needs.
1.2	**ENGAGEMENT & CONSULTATION**
1.2.1	We have a strategy for engaging and involving customers using a range of methods appropriate to the needs of identified customer groups.
1.2.2	We have made the consultation of Customers integral to continually improving our service and we advise customers of the results and action taken.
1.2.3	We regularly review our strategies and opportunities for consulting and engaging with Customers to ensure that the methods used are effective and provide reliable and representative results.
1.3	**CUSTOMER SATISFACTION**
1.3.1	We use reliable and accurate methods to measure Customer satisfaction on a regular basis.
1.3.2	We analyse and publicise satisfaction levels for the full range of Customers for all main areas of our service and we have improved services as a result.
1.3.3	We include in our measurement of satisfaction specific questions relating to key areas including those on delivery, timeliness, information, access, and the quality of Customer service, as well as specific questions which are informed by customer Insight.
1.3.4	We set challenging and stretching targets for customer satisfaction and our levels are improving.
1.3.5	We have made positive changes to services as a result of analysing Customer experience, including improved customer satisfaction.
2	**CULTURE OF THE ORGANISATION**
2.1	**LEADERSHIP, POLICY & CULTURE**
2.1.1	There is corporate commitment to putting the Customer at the heart of service delivery and leaders in our organisation actively support this and advocate for customers.
2.1.2	We use Customer Insight to inform policy and strategy and to prioritise service improvement activity.
2.1.3	We have policies and procedures which support the right of all Customers to expect excellent levels of service.

2.1.4	We ensure that all Customers and customer groups are treated fairly and this is confirmed by Feedback and the measurement of customer experience.
2.1.5	We protect Customers? privacy both in face-to-face discussions and in the transfer and storage of customer information.
2.1.6	We empower and encourage all employees to actively promote and participate in the customer focused culture of our organisation.
2.2	**STAFF PROFESSIONALISM & ATTITUDE**
2.2.1	We can demonstrate our commitment to developing and delivering Customer focused services through our recruitment, training and development policies for staff.
2.2.2	Our staff are polite and friendly to Customers and have an understanding of customer needs.
2.2.3	We prioritise Customer focus at all levels of our organisation and evaluate individual and team commitment through the performance management system.
2.2.4	We can demonstrate how customer-facing staffs' insight and experience is incorporated into internal processes, policy development and service planning.
2.2.5	We value the contribution our staff make to delivering Customer focused services, and leaders, managers and staff demonstrate these behaviours.
3	**INFORMATION & ACCESS**
3.1	**RANGE OF INFORMATION**
3.1.1	We make information about the full range of services we provide available to our Customers and potential customers, including how and when people can contact us, how our services are run and who is in charge.
3.1.2	Where there is a charge for services, we tell our Customers how much they will have to pay.
3.2	**QUALITY OF INFORMATION**
3.2.1	We provide our Customers with the information they need in ways which meet their needs and preferences, using a variety of appropriate channels.
3.2.2	We take reasonable steps to make sure our Customers have received and understood the information we provide.
3.2.3	We have improved the range, content and quality of verbal, published and web based information we provide to ensure it is relevant and meets the needs of Customers.
3.2.4	We can demonstrate that information we provide to our Customers is accurate and complete, and that when this is not the case we advise customers when they will receive the information they requested.
3.3	**ACCESS**
3.3.1	We make our services easily accessible to all customers through provision of a range of alternative channels.
3.3.2	We evaluate how customers interact with the organisation through access channels and we use this information to identify possible service improvements and offer better choices.

3.3.3	We ensure that where Customers can visit our premises in person facilities are as clean and comfortable as possible.
3.4	**COOPERATIVE WORKING WITH OTHER PROVIDERS, PARTNERS & COMMUNITIES**
3.4.1	We have made arrangements with other providers and partners to offer and supply co-ordinated services, and these arrangements have demonstrable benefits for our Customers.
3.4.2	We have developed co-ordinated working arrangements with our partners that ensure customers have clear lines of accountability for quality of service.
3.4.3	We interact within wider communities and we can demonstrate the ways in which we support those communities.
4	**DELIVERY**
4.1	**DELIVERY STANDARDS**
4.1.1	We have challenging standards for our main services, which take account of our responsibility for delivering national and statutory standards and targets.
4.1.2	We monitor and meet our standards, key departmental and performance targets, and we tell our customers about our performance.
4.1.3	We consult and involve customers, citizens, partners and staff on the setting, reviewing and raising of our local standards.
4.2	**ACHIEVED DELIVERY & OUTCOMES**
4.2.1	We agree with our Customers at the outset what they can expect from the service we provide.
4.2.2	We can demonstrate that we deliver the service we promised to individual Customers and that outcomes are positive for the majority of our customers.
4.2.3	We can demonstrate that we benchmark our performance against that of similar or complementary organisations and have used that information to improve our service.
4.2.4	We have developed and learned from Best Practice identified within and outside our organisation, and we publish our examples externally where appropriate.
4.3	**DEAL EFFECTIVELY WITH PROBLEMS**
4.3.1	We identify any dips in performance against our standards and explain these to Customers, together with action we are taking to put things right and prevent further recurrence.
4.3.2	We have an easy to use complaints procedure, which includes a commitment to deal with problems fully and solve them wherever possible within a reasonable time limit.
4.3.3	We give staff training and guidance to handle complaints and to investigate them objectively, and we can demonstrate that we empower staff to put things right.
4.3.4	We learn from any mistakes we make by identifying patterns in formal and informal complaints and Comments from Customers and use this information to improve services and publicise action taken.
4.3.5	We regularly review and improve our Complaints procedure, taking account of the views of Customers, complainants and staff.

4.3.6	We ensure that the outcome of the complaint process for Customers (whose complaint is upheld) is satisfactory for them.
5	**TIMELINESS & QUALITY**
5.1	**STANDARDS FOR TIMELINESS & QUALITY**
5.1.1	We set appropriate and measurable standards for the timeliness of response for all forms of Customer contact including phone calls, letters, e-communications and personal callers.
5.1.2	We set comprehensive standards for all aspects of the quality of customer service to be expected in all dealings with our organisation.
5.2	**TIMELY OUTCOMES**
5.2.1	We advise our Customers and potential customers about our promises on timeliness and quality of customer service.
5.2.2	We identify individual customer needs at the first point of contact with us and ensure that an appropriate person who can address the reason for contact deals with the customer.
5.2.3	We promptly share Customer information with colleagues and partners within our organisation whenever appropriate and can demonstrate how this has reduced unnecessary contact for customers.
5.2.4	Where service is not completed at the first point of contact we discuss with the Customer the next steps and indicate the likely overall time to achieve outcomes.
5.2.5	We respond to initial enquiries promptly, if there is a delay we advise the customer and take action to rectify the problem.
5.3	**ACHIEVED TIME DELIVERY**
5.3.1	We monitor our performance against standards for timeliness and quality of Customer service and we take action if problems are identified.
5.3.2	We are meeting our current standards for timeliness and quality of Customer service and we publicise our performance against these standards.
5.3.3	Our performance in relation to timeliness and quality of service compares well with that of similar organisations.

APPENDIX 2

BUSINESS CASE

Project Name:	Customer Service Excellence		
Project Sponsor:	Steve Hampson – Executive Director		
Project Manager:	Paul Knight – Customer Services Coordinator		
Date Issued:	27-11-09	Version No:	1

Reasons:
Working towards the Customer Service Excellence Standard will assist the Council in fulfilling its commitment to customer service. The standard supports a number of national and local priorities and will help improve the Council service previously described by an audit report as variable.

Options:
The Council considered three options of working towards the Customer Service Excellence standard. These options were considered on the amount of value that each would bring to the customer and Council. 4. Seek Council wide formal accreditation 5. Seek formal accreditation by specific service area 6. Use Customer Service Excellence without seeking formal accreditation The Council concluded that option one, to seek Council wide formal accreditation, would bring the most benefit to the customer and organisation. Formal accreditation would emphasise the importance and priority of the project and would give the Council the benefit of external assessment. Council wide accreditation was deemed essential to ensure a consistent service and fully embedded customer focused culture.

Benefits:
The customer will benefit from a truly customer focused organisation that places the public at the heart of service design and delivery by: - Developing an in-depth understanding of the characteristics of our current and potential customer groups and using this information to better serve the customer and their preferences. - Making the consultation of customers integral to continually improving our service and advising customers of the results and action taken. - Analysing customer journey mapping to improve understanding of how customers interact with the Council and making improvements to reduce barriers and increase access. - Making information about the full range of services we provide available to our customers and potential customers, including how and when people can contact us, how our services are run and who is in charge. - Evaluating how customers interact with the organisation through various access channels will ensure the Council is providing accessible services to all - Giving staff training and guidance to handle complaints and to investigate them objectively will improve the customer experience and complainant satisfaction. - Promptly sharing customer information with colleagues and partners within our organisation whenever appropriate reducing unnecessary contact for customers. The organisation will gain a range of benefits by working towards the Customer Service

excellence standard. These will include:

- Improved customer insight by gaining a greater understanding of our customers, their characteristics and priorities. This will enable the Council to increase efficiency and effectiveness by allocating resources to customers needs.
- Increased customer consultation will assist the Council in its aim to be a listening Council. It will provide further opportunity for customers to share their opinions and in turn could increase performance against National Indicator Four – Percentage of people who can influence decisions in their locality. Increased consultation will also provide valuable feedback that can be used to shape future service delivery.

- The implementation of customer journey mapping will help the Council to ensure customer contact methods are efficient. Removing unnecessary barriers and steps could result in efficiency savings.
- Improved availability and range of information will be of benefit to the customer but could also reduce significant amounts of officer time.
- Improved communication and joined up working practices between corporate and service areas will improve customer service and bring the organisation together as one.
- Providing a consistent service throughout the Council could increase customer satisfaction and further improve Council reputation.
- Placing the customer at the beginning of service design will increase the ability of the Council to get it right first time.

Risks:

- Organisational Capacity
- Other Council Priorities
- Service First Budget Inadequate
- Limited Member or officer buy in.
- Poor performance in the pre assessment check leading to demoralisation.
- Assessment failure leading to demoralisation.

Cost and Timescale:

The project timescale is December 1st 2009 to March 31st 2011.

The cost of assessment and related services is £12,600

A contingency of £10,000 has been allowed to assist services in meeting the CSE criteria.

Investment Appraisal:

The Customer Service Excellence Standard will drive a customer focused cultural change throughout the organisation. The standard will support the Council in it's vision, values, aims and objectives. The project outcomes are sustainable and will result in the Council being able to meet public and government expectations.

Authorised By:	Signature	Date
Project Manager:		
Project Sponsor:		

Project Name:	Customer Service Excellence Standard (CSE)		
Project Sponsor:	Steve Hampson – Executive Director		
Project Manager:	Paul Knight – Customer Services Coordinator		
Date Issued:	27-11-09	Version No:	1.0

Background:

The Government wants public services for all that are efficient, effective, excellent, equitable and empowering – with the citizen always and everywhere at the heart of public service provision. The Council supports the Government's desire to place customers at the centre of service provision and as such has indentified Customer Service as a key value. Underpinning the organisation values are key actions and commitments. CSE supports these actions and commitments and provides a framework which will address a number of actions relating to customer service.

CSE replaces the previous Charter Mark Award and is a practical tool to support and drive services that are more responsive to people's needs. It emphasises areas that research has shown are a priority for customers: delivery, timeliness, information, professionalism and staff attitude. There is also emphasis on understanding customers and the user's experience and the robust measurement of customer satisfaction.

Customer Service Excellence is designed to operate on three distinct levels:
1. As a driver of continuous improvement. By allowing organisations to self assess their capability in relation to customer focussed service delivery, identifying areas and methods for improvement;
2. As a skills development tool. By allowing individuals and teams within the organisation to explore and acquire new skills in the area of customer focus and customer engagement, thus building their capacity for delivering improved services;
3. As an independent validation of achievement. By allowing organisations to seek formal accreditation, demonstrate their competence, identify key areas for improvement and celebrate their success.

Those organisations in the UK that want to achieve CSE through formal assessment, whether they are in the public, private or voluntary sectors, are able to do so. No restrictions on eligibilty have been imposed. A growing number of local authorities have and are achieving CSE within specific service areas. At present only one local authority have achieved the standard across the board.

During May and June 2009 the Council undertook a self assessment against the CSE standard. The Service First Steering Group set out to assess the Council against the standard and to identify areas in need of improvement. A large section of services took part including services from New Communities, Health and Environmental Services, Planning & Sustainable Communities and Affordable Homes.

Services were asked to rate how their services met the criteria of the standard. Four options were available; 100%, >50%. <50%, 0%. The level of meeting the criteria differs by service.

CSE is made up of 57 criteria, to gain formal accreditation the Council must meet all criteria in full and be able to provide evidence of doing so.

The Service First Steering Group have reviewed the results of the self assessment and have considered how best to use the CSE. The group concluded that working towards CSE accreditation as one council will bring benefits to the organisation and it's customer.

Project Objectives:	
The Council will measure the success of the project on the following objective: Achieving Council Wide Customer Service Excellence accreditation by 31st March 2011.	
IN SCOPE	**OUT OF SCOPE**
Seven Work Streams will work to meet and evidence the 57 Customer Service Excellence criteria: Corporate Services Affordable Housing Planning & Sustainable Communities New Communities Community & Customer Services Health & Environmental Services Finance & Support Services Only work that contributes to meeting and evidencing the 57 Customer Service Excellence criteria will be in scope of the project.	The scope of the project does not include work outside of that which contributes towards meeting and evidencing the 57 Customer Service Excellence criteria.

Products / Outcomes:

Desired outcomes include:

- An in-depth knowledge of our customer groups, understanding their characteristics, needs & preferences.

- Customer consultation central to service design & delivery

- Customer insight used to inform policy & strategy.

- Customer focus prioritised at all levels of the organisation.

- Improved range, content & quality of verbal, published & web information.

- The ability to demonstrate that the Council delivers it promises to customers and that outcomes are positive for the majority of the public.

- Improved customer satisfaction levels.

- Increased joined up working resulting in further efficiency savings.

- Further improved Council reputation.

- The ability to demonstrate the Council's commitment to it's vision, values and aims.

Assumptions and Constraints:

Assumptions

The Customer Service Excellence project has been structured and planned based on the following assumptions:

- The Council, it's officers and Members are committed to the Council's vision, values, aims, approaches and actions.

- The Service First Steering Group budget for 2009/10 & 2010/11 remains at £12,300 PA and is available specifically for this project.

- Members, Senior Management Team and Executive Management Team are committed to achieving Customer Service Excellence by 31st March 2011.

- Provision is made for 18.5 hours of the Customer Service Coordinator role to project manage the project.

- Provision is made for a Project Support Officer for 18.5hrs a week and this cost to be allocated outside of the Service First budget.

- The Service First Steering Group become the Customer Service Excellence Project Group, with the sole focus on the achievement of the project.

- Members of the Customer Service Excellence Project Group are committed to acting as project leads within their corporate / service areas.

- The Customer Service Excellence project is given a Council wide top priority for 2010/11.

- Council services will have enough finances to continue with and implement new activities essential to meeting and evidencing the Customer Service Criteria.

Constraints

- The combined Service First Steering Group Budget for 2009/10 & 2010/11 is £24,600. No further financial resources have been allocated to the project.

- A Project Manager has been allocated for 18.5 hours per week throughout the project.

- A Project Support Officer has been allocated for 18.5 hours per week throughout the project.

- Organisational capacity. Financial and staff resources are at an all time low. The organisation will need to manage its many priorities effectively.

- The Council has committed to achieving the Customer Service Excellence Award no later than 31st March 2011.

Risks:

A detailed Risk Assessment can be found in the Customer Service Excellence Document. A summary of the risks are detailed below:

- Organisational Capacity
- Other Council Priorities
- Service First Budget Inadequate
- Limited Member and/or Officer buy in
- Project Team demoralised in the event of pre assessment failure
- Project Team demoralised in the event of formal assessment failure

Project Quality Plan:

The success and quality of the project outcome will be measured by external assessment and verification of the Council against the Customer Service Excellence Standard.

Project Organisation Structure:

Communications Plan:
A detailed communications plan is being drafted by the Project Manager & Communications Team. This plan will be found in the Customer Service Excellence Project Document.
In summary communication of project progress will be made through a number of channels:
Insite Page Scene Magazine Scambs Magazine Corporate Brief Chief Executives Weekly Message Staff Seminars Street Displays

Project Controls:
A detailed account of project controls can be located in the Customer Service Excellence Project Document. A summary has been provided below:
The Project Manager will use the Highlight Report Template to report progress to the Customer Service Excellence Project Group at monthly meetings. Work Stream Leaders will also report the progress of their respective areas of work, using the Work Stream Highlight Report Template. A quarterly highlight report will be provided to the Executive Management Team and the Lead Member for Customer Service.
The project consists of five stages. Five stage reviews have been scheduled with the Project Sponsor and Customer Service Excellence Project Group.
It is inevitable that during the course of the project changes will need to be made. Changes will be classed as either major or minor and each has their own process.
Major Changes
Where major problems affect the ability to deliver products or affect the amount of resources required, or the requirements need to change, the Request for Change Template should be used.
The project member suggesting the change should complete the first section of the form. It includes sections for "Description of Change" and also an "Expected Benefits" statement, which should provide justification for this change.
The second section "Impact Analysis", should be completed by the Project Manager, after consultation with the relevant stakeholders. Major changes requests should be made at the nearest Customer Service Excellence Project Group meeting, and must be approved by the Project Sponsor.
Minor Changes
Minor Changes are those that are easy to accommodate and do not result in a need to increase resources or extend the timescale of the project. In the case of minor changes, the Project Manager should be consulted, who will assess the impact before approving the change. Minor changes should form part of the highlight report to the Customer Service Excellence Project Group.

Baseline Start Date: **01 December 2009**	*Baseline Finish Date:* **31 March 2011**

PROJECT NAME: Customer Service Excellance Standard

ID	Task Name	2009 Nov	Dec	2010 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
S1	**ORGANISATIONAL PREPARATION**																		
1.1	Getting Started Workshop																		
1.2	Self Assessment																		
1.3	Customer Journey Mapping Workshop																		
1.4	Customer Segmentation																		
1.5	Customer Service Excellence Awareness Seminars																		
S2	**MEETING, EVIDENCING & REVIEWING CRITERIA**																		
2.1	Getting Ready Workshop																		
2.2	Corporate Services																		
2.3	Documentary Review																		
2.4	Community & Customer Services																		
2.5	Affordable Housing																		
2.6	Planning & Sustainable Communities																		
2.7	Finance & Support Services																		
2.8	New Communities																		
2.9	Health & Environmental Services																		
2.10	Documentary Review																		
S3	**PRE ASSESSMENT, GAP ANALYSIS & CORRECTION**																		
3.1	Pre Assessment																		
3.2	Gap Analysis & Correction																		
S4	**ASSESSMENT & VERIFICATION & CORRECTION**																		
4.1	On Site Assessment																		
4.2	Final Feedback Meeting																		
4.3	Professional Report																		
4.4	Decision																		
4.5	Accreditation																		
S5	**PROJECT REVIEW & ONGOING CERTIFICATION**																		
5.1	Project Review & Ongoing Certification Options Meeting																		

Resources:	
Budget: £22,600	*Total Staff Work Days:* 946

The project will require the following staff & Financial Resources:

Qty	Role	Work Days
1	Project Sponsor	16
1	Project Manager	130
1	Project Support Officer	130
7	Work Stream Leaders	25
28	Work Stream Members	15
5	Policy & Performance Representatives	15

The project will require an estimated total of 946 workdays over a 16 month duration.

Qty	Product	Unit Cost	Total Cost	Budget
1	Getting Started Workshop	£600.00	£600.00	SF
1	Customer Journey Mapping Workshop	£600.00	£600.00	SF
1	Customer Segmentation Workshop	£600.00	£600.00	SF
9	CSE Awareness Sessions	£200.00	£1800.00	SF
1	Getting Ready Workshop	£600.00	£600.00	SF
2	Documentary Review	£600.00	£1200.00	SF
1	Pre-Assessment	£3300.00	£3300.00	SF
1	Initial Assessment Meeting	£300.00	£300.00	SF
1	Formal Assessment	£2700.00	£2700.00	SF
1	Final Feedback Meeting	£300.00	£300.00	SF
1	Professional Report	£600.00	£600.00	SF
1	Meeting Criteria	£10000	£10000	SF
	All prices exclude VAT		£22,600	

The project has been allocated a budget of £22,600 sourced from the combination of the 2009/10 and 2010/11 Service First budget.

Authorised By:	*Signature*	*Date*
Project Manager:		
Project Sponsor:		

APPENDIX 4

	Customer Service Excellence Standard — Self Assessment													
Meeting Requirement														
Key	**Affordable Housing**	**Finance**		**Health & Environmental Services**				**Planning & Sustainable Communities**				**New Communities**		
100% / >50% / <50% / 0%	**Afforable Housing**	**Benefits**	**Revenues**	**Food Safety**	**Licensing**	**Pest Control**	**Waste Management & Recycling**	**Building Control**	**Conservation**	**Development Control**	**Planning Policy**	**Community Engagement**	**Cultural Services**	**Major Developments**
1 Customer Insight														
1.1 Customer Indentifiaction														
1.1.1	<50%	>50%	>50%	>50%	>50%	>50%	100%	>50%	<50%	100%	>50%	>50%	<50%	0%
1.1.2	<50%	>50%	>50%	>50%	>50%	>50%	100%	<50%	<50%	>50%	>50%	>50%	<50%	<50%
1.1.3	<50%	>50%	>50%	100%	100%	100%	100%	0%	0%	>50%	>50%	100%	<50%	<50%
1.2 Engagement & Consultation														
1.2.1	<50%	>50%	>50%	100%	100%	100%	100%	<50%	<50%	>50%	>50%	100%	<50%	<50%
1.2.2	>50%	>50%	>50%	>50%	>50%	>50%	>50%	<50%	<50%	>50%	>50%	100%	<50%	0%
1.2.3	<50%	>50%	<50%	100%	100%	100%	100%	<50%	<50%	<50%	>50%	100%	<50%	0%
1.3 Customer Satisfaction														
1.3.1	>50%	100%	>50%	100%	100%	100%	100%	<50%	<50%	>50%	0%	<50%	<50%	0%
1.3.2	<50%	100%	<50%	100%	100%	100%	100%	0%	<50%	>50%	0%	0%	0%	0%
1.3.3	<50%	100%	>50%	>50%	<50%	100%	100%	<50%	<50%	>50%	0%	100%	<50%	0%
1.3.4	<50%	100%	>50%	<50%	<50%	<50%	<50%	<50%	<50%	100%	0%	100%	<50%	<50%
1.3.5	<50%	100%	>50%	100%	>50%	>50%	100%	<50%	<50%	>50%	0%	100%	<50%	<50%
2 The Culture of the Organisation														
2.1 Leadership, Policy & Culture														
2.1.1	100%	100%	100%	100%	100%	100%	100%	>50%	>50%	100%	>50%	<50%	<50%	<50%
2.1.2	>50%	100%	>50%	100%	100%	100%	100%	>50%	<50%	>50%	>50%	0%	0%	<50%
2.1.3	>50%	100%	100%	100%	100%	100%	100%	<50%	>50%	>50%	>50%	>50%	<50%	<50%
2.1.4	>50%	100%	>50%	<50%	100%	<50%	100%	<50%	>50%	>50%	<50%	<50%	<50%	<50%
2.1.5	100%	<50%	100%	>50%	100%	>50%	<50%	>50%	<50%	100%	>50%	<50%	<50%	<50%
2.1.6	>50%	100%	100%	100%	100%	100%	100%	>50%	>50%	>50%	>50%	<50%	<50%	<50%
2.2 Staff Professionalism & Attitude														
2.2.1	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	<50%	<50%	100%
2.2.2	100%	100%	100%	100%	100%	100%	100%	>50%	>50%	100%	100%	100%	<50%	>50%
2.2.3	>50%	100%	100%	100%	100%	100%	100%	>50%	<50%	>50%	0%	0%	<50%	>50%
2.2.4	>50%	100%	100%	>50%	>50%	>50%	>50%	<50%	<50%	<50%	<50%	<50%	<50%	<50%
2.2.5	>50%	100%	100%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	<50%	<50%	<50%

3 Information & Access														
3.1 Range of Information														
3.1.1	>50%	100%	100%	>50%	>50%	>50%	>50%	100%	>50%	100%	100%	<50%	<50%	>50%
3.1.2	100%	100%	100%	>50%	100%	100%	100%	100%	<50%	100%	100%	<50%	>50%	>50%
3.2 Quality of Information														
3.2.1	>50%	>50%	>50%	100%	100%	100%	100%	>50%	<50%	>50%	>50%	<50%	>50%	<50%
3.2.2	>50%	100%	100%	<50%	100%	>50%	>50%	<50%	>50%	>50%	>50%	>50%	<50%	0%
3.2.3	>50%	>50%	100%	<50%	>50%	<50%	<50%	>50%	>50%	>50%	>50%	>50%	<50%	<50%
3.2.4	>50%	100%	100%	>50%	>50%	>50%	>50%	<50%	>50%	>50%	100%	<50%	<50%	>50%
3.3 Access														
3.3.1	>50%	>50%	100%	100%	100%	100%	100%	>50%	<50%	>50%	100%	<50%	<50%	100%
3.3.2	<50%	0%	0%	100%	100%	100%	100%	<50%	0%	<50%	>50%	0%	<50%	<50%
3.3.3	100%	100%	100%	0%	0%	0%	0%	100%	>50%	100%	100%	>50%	>50%	100%
3.4 Cooperative working with other providers, partners & communities														
3.4.1	>50%	0%	>50%	100%	>50%	>50%	100%	<50%	<50%	>50%	100%	<50%	>50%	<50%
3.4.2	<50%	0%	>50%	100%	>50%	>50%	100%	<50%	<50%	>50%	>50%	<50%	>50%	<50%
3.4.3	>50%	0%	0%	<50%	100%	<50%	100%	<50%	>50%	>50%	>50%	>50%	>50%	>50%
4 Delivery														
4.1 Delivery Standards														
4.1.1	100%	100%	100%	100%	100%	100%	100%	>50%	100%	100%	100%	>50%	<50%	100%
4.1.1	>50%	100%	100%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	0%	<50%	<50%	>50%
4.1.3	<50%	100%	100%	>50%	100%	>50%	100%	<50%	<50%	>50%	0%	<50%	<50%	0%
4.2 Achieved Delivery & Outcomes														
4.2.1	<50%	100%	100%	<50%	100%	>50%	>50%	>50%	<50%	>50%	>50%	<50%	>50%	<50%
4.2.2	>50%	<50%	>50%	100%	100%	100%	100%	<50%	<50%	>50%	0%	<50%	>50%	<50%
4.2.3	<50%	0%	100%	100%	100%	100%	100%	>50%	<50%	<50%	100%	0%	<50%	>50%
4.2.4	>50%	0%	0%	<50%	>50%	<50%	100%	<50%	<50%	<50%	>50%	<50%	>50%	100%
4.3 Deal effectivley with problems														
4.3.1	<50%	<50%	<50%	>50%	>50%	>50%	>50%	<50%	<50%	<50%	<50%	0%	<50%	>50%
4.3.2	100%	100%	100%	100%	100%	100%	100%	>50%	>50%	100%	>50%	>50%	<50%	>50%
4.3.3	<50%	100%	100%	<50%	<50%	<50%	<50%	>50%	<50%	>50%	>50%	<50%	<50%	<50%
4.3.4	<50%	100%	100%	<50%	<50%	<50%	<50%	<50%	>50%	<50%	>50%	<50%	>50%	<50%
4.3.5	>50%	100%	100%	<50%	<50%	<50%	<50%	<50%	<50%	<50%	0%	<50%	<50%	0%
4.3.6	>50%	100%	100%	<50%	<50%	<50%	<50%	<50%	>50%	>50%	>50%	<50%	<50%	<50%
5 Timeliness & Quality of Services														
5.1 Standards for timeliness & quality														
5.1.1	>50%	100%	100%	100%	100%	100%	100%	>50%	>50%	100%	>50%	>50%	<50%	<50%
5.1.2	>50%	100%	100%	100%	100%	100%	100%	<50%	>50%	>50%	>50%	>50%	<50%	<50%
5.2 Timly Outcomes														
5.2.1	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	>50%	<50%	<50%	<50%
5.2.2	100%	100%	>50%	<50%	100%	100%	>50%	>50%	100%	>50%	100%	<50%	>50%	>50%
5.2.3	<50%	100%	>50%	>50%	100%	>50%	>50%	<50%	<50%	>50%	>50%	<50%	<50%	<50%
5.2.4	>50%	100%	100%	<50%	>50%	100%	>50%	<50%	<50%	>50%	>50%	>50%	<50%	>50%
5.2.5	>50%	100%	100%	<50%	100%	100%	>50%	>50%	>50%	>50%	100%	>50%	<50%	<50%
5.3 Achieved Time Delivery														
5.3.1	>50%	100%	<50%	>50%	>50%	100%	100%	>50%	>50%	>50%	0%	<50%	<50%	<50%
5.3.2	>50%	<50%	<50%	>50%	>50%	100%	100%	>50%	>50%	>50%	0%	<50%	<50%	<50%
5.3.3	>50%	100%	100%	>50%	>50%	>50%	100%	>50%	>50%	<50%	0%	<50%	<50%	<50%

Appendix 1 – Customer Service Excellence Project Document

APPENDIX 5

HIGHLIGHT REPORT

Project Name:	
Period Covered:	
Date Issued:	
Produced By:	

Schedule Status:
Budget Status:
Resource Status:
Products completed during this period:
Products to be completed during the next period:
Key Project Risks:
Key Project Issues:
Budget and Schedule Impact of any changes:

APPENDIX 6

WORK STREAM HIGHLIGHT REPORT

Work Stream:	
Period Covered:	
Date Issued:	
Produced By:	

Schedule Status:
Resource Status:
Products completed during this period:
Products to be completed during the next period:
Risks:
Issues:

APPENDIX 7

REQUEST FOR CHANGE

Part 1 – Description of Change

Project Name:	
Person Requesting Change:	
Date RFC Raised:	
Issue Log No:	

Description of Change:
Expected Benefits:

Part 2 – Impact Analysis

Technical Impact (Number of Days Work and Other Products Affected):
Financial Impact (Cost of Change):
Decision – Action Required or Reason for Rejection:

Authorised By:	*Signature*	*Date*
Project Manager:		
Project Sponsor:		