

# **Output Specification: Customer Services Organisation**

## **March 2013**

---

# 1 Contents

1	Contents.....	2
2	Document Ownership.....	2
3	Definitions.....	3
4	Scope .....	4
4.1	Rationale for the CSO.....	4
4.2	Vision and principles for the CSO .....	5
4.3	Scope of services to be provided through the CSO .....	6
5	Data Room Documents.....	18
6	Service Requirement .....	22
7	Performance Indicators .....	32

# 2 Document Ownership

<b>Document signed off by</b>	Lauren Doody, Head of Customer Services and Libraries on 19 <sup>th</sup> February 2013
<b>Document Owner</b>	John Hooton, Deputy Chief Operating Officer, LBB

### 3 Definitions

The words in this Customer Services Organisation Output Specification shall have the meanings attributed to them in the Agreement where the context so permits and unless otherwise stated.

In this Customer Services Organisation Output Specification, unless the context otherwise requires, the following words and expressions shall have the meanings given below:

Term	Definition
Barnet Homes	means Barnet Homes Limited, (Company registered number 04948659) whose registered office is at Barnet House, 1255 High Road, Whetstone, London N20 0EJ
CRM	means customer relationship management
CSO	means the Authority's customer services organisation function and matters and pertaining to the activities of a customer services organisation function including (but not limited to) those contained in this Customer Services Organisation Output Specification
DRS Service Provider	means the third party provider of development and regulatory services to the Authority
FCR	means first contact resolution
FOI	means the Freedom of Information Act 2000
FYi	means the families and young people's information service
IVR	means interactive voice response
LLPG	means Local Land and Property Gazetteer
M.A.S.H	means multi-agency safeguarding hub
NLPG	means National Land and Property Gazetteer
NSL	means NSL Services Group
OT	means an occupational therapist
PCI	means the Payment Card Industry
PCN	means a Penalty Charge Notice in relation to parking infractions
SAR	means a subject access request under the Data Protection Act 1998
SLA	means a service level agreement entered into by the Authority
SW	Social Worker

## 4 Scope

### 4.1 Rationale for the CSO

The Service Provider shall operate the CSO from the Service Transfer Date and shall deliver the following outcomes for customers, the Authority and staff:

- substantially improved customer and resident experience of dealing with the Authority
- services designed so that customers can help themselves
- improved services developed from an in-depth understanding of the needs of customers
- a personalised customer experience (where possible)
- customers able to make choices about their services
- customers understand and are aware where service is and is not available
- services and information that build customers' capability
- customer services that act as an advocate for individual customers and customers in general
- service provision based around people's lives, not service structures
- insight and data from customer interactions continually built in to delivery of services
- services delivered through channels that are most appropriate for customers needs
- financial savings
- a better understanding of customers
- freeing up professional Officers' time for specialist service delivery
- placing a greater value on staff whose role is customer services

## 4.2 Vision and principles for the CSO

### 4.2.1 Vision

The Service Provider shall use its reasonable endeavours in meeting the Authority's CSO objectives which are:

- To improve customer satisfaction by being more effective in meeting needs
- To deliver services via the most cost effective channel
- A service that helps manage demand at the front end
- To enable customer independence
- Intelligent design of the service – driven by customer insight
- To drive down end-to-end cost of delivery and frees up professional time.

The Service Provider shall develop for the CSO function a platform that: is flexible in terms of being able to take on a range of other services over time; provides the customer and the Authority with a single view of a customers transactions; maximises the potential for greater use of mobile devices; and supports the Authority in minimising the potential for fraud.

### 4.2.2 Design principles

The Service Provider shall adhere to the following twelve design principles in its design of the CSO service:

- The service shall encourage customers to use the most cost effective channel or choice of channels when they contact the Authority
- Customers are treated with dignity and respect
- The service shall deliver a consistent, high quality experience regardless of the channel type or service requested
- The serviceshall maximise opportunities for customer self-service and use of emerging technologies (both for self-service and other approaches that enhance the customer experience and leverage efficiency in terms of savings)
- The service shall work with Delivery Units and lead commissioners to ensure that demand for public services is reduced
- The service shall ensure insight and information from the customer experience is captured to support marketing and communication of services and is the foundation for commissioning, designing and improving delivery of public services across the Authority (i.e. the Service Provider supports service improvement, change and transformation in services delivered by the Authority and other partners)
- The service shall join up Authority and local public services around the needs and life events of customers by offering a holistic and personalised approach to service delivery (where appropriate)

- The service shall enable customers to resolve issues through a single point of contact within customer services and have a single view of their interactions with the Authority
- The service shall offer services and information that build customers' capability to help themselves and others
- The service shall enable customers to only have to provide information once, which can be used to access a range of related services
- The service shall provide a coherent brand, identity and ethos for customer services that builds a new relationship with the citizens of the Authority
- The service shall comply with the Authority's safeguarding and equalities responsibilities

### 4.3 Scope of services to be provided through the CSO

The Service Provider shall, from the Service Transfer Date, be responsible for delivering all of the activities described in the table below. The Service Provider shall ensure that the outcome of CSO activities (e.g. providing set data to the back office for processing, fulfilment of a Blue Badge request) is completed as per the detail within the process maps within the operational design documents listed in section 5 (Data Room Documents) of this Output Specification.

From the Service Transfer Date, the Service Provider shall continue the development of the CSO function previously undertaken by the Authority. The Service Provider shall drive improved performance in the CSO from its position at the Service Transfer Date. The Service Provider shall bring proposals to the Authority for the expansion (both in breadth and depth) of the CSO function throughout the life of the contract to ensure that the Authority's vision for the CSO function is fully realised.

The Service Provider shall deliver this improvement and development activity across the full range of contact channels. The Service Provider may determine the model it uses for the delivery of this activity save that such activity is as cost effective as possible for the Authority, delivers the required level of customer satisfaction to all of the Authority's diverse customer groups and adheres to the Authority's CSO design principles listed above.

The Service Provider shall, for all activity unless otherwise excluded, track and report on all logged service requests. For services where the CSO is not the first point of contact, the Authority shall ensure that appropriate processes are in place to enable this data to be available to the Service Provider.

The Service Provider shall identify and resolve service requests on behalf of the customer for all services where the CSO function is the initial point of contact (across all channels including level 0 activities) and is empowered to resolve requests.

The Service Provider shall provide the Authority with comprehensive data and information regarding all customer interactions, both those managed by the CSO and those managed by third parties provided the Authority has directed third parties to share such information in the required format.

The Service Provider shall ensure that web content relating to all activity for which it is responsible is up to date, accurate and of high quality.

## 4.3.1 Expected service activity

The Service Provider shall deliver the CSO function including the activities as outlined in the table below with Deferred Services being introduced via Change at a future date to be agreed between the Parties. Full details of the in scope activity are included within the operational design documents listed in section 5 (Data Room Documents) of this Output Specification.

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
General Enquiries / Switchboard	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Signposting/ call transfer</li> </ul>	✓	✓	✓			Delivered by CSO
General Enquiries / Reception (Barnet House and Burnt Oak)	<ul style="list-style-type: none"> <li>Receptionist</li> <li>General enquiries</li> <li>Signposting</li> <li>Verification of documents / scanning</li> </ul>				✓		Delivered by CSO
Planning	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Take file requests and decisions notices</li> <li>Update on cases</li> </ul>	✓	✓	✓			Delivered by CSO at Service Transfer Date for a maximum period of two months but shall be delivered by DRS Service Provider, with the exception of level 0 activity which shall be delivered through the CSO.

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Planning	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Make copies of documents</li> <li>Provide decision notices / orders for full size plans</li> <li>Take payments</li> <li>Organise file requests</li> </ul>				✓		Delivered by CSO at Service Transfer Date for a maximum of two months but shall be delivered by DRS Service Provider, with the exception of level 0 activity which shall be delivered through the CSO.
Building Control	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Send out application forms</li> <li>Guidance on completing forms</li> <li>Book inspections</li> <li>Report dangerous structures</li> </ul>	✓					Delivered by CSO at Service Transfer Date for a maximum of two months but shall be delivered by DRS Service Provider, with the exception of level 0 activity which shall be delivered through the CSO.
Street Based Services (includes green spaces and parks, including trees; waste and sustainability; streetscene, including waste and recycling collections; grounds maintenance, including pitch letting).	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Analysis of urgency of incident</li> <li>Signposting / call transfer</li> <li>Raise service requests</li> <li>Status updates</li> <li>Payments for green waste</li> </ul>	✓	✓	✓			Delivered by CSO.



## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Street Based Services (Includes general highways maintenance, road and pavement maintenance, gritting, street furniture and priority intervention, including anti social behaviour; fly tip investigations)	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Analysis of urgency of incident</li> <li>Signposting/ call transfer</li> <li>Raise service requests</li> <li>Status updates</li> </ul>	✓					Delivered by CSO at Service Transfer Date for a maximum of two months but shall be delivered by DRS Service Provider, with the exception of level 0 activity which shall be delivered through the CSO.
Environment and Operations (includes Highways licences-building material, hoarding licences, scaffolding licences, crane licences; Cross-overs-provision and updating of application forms, white line requests etc; private street name plates-provision and updating application forms)	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Analysis of urgency of incident</li> <li>Signposting/ call transfer</li> <li>Raise service requests</li> <li>Status updates</li> </ul>	✓	✓	✓			Delivered by CSO at Service Transfer Date for a maximum of two months but shall be delivered by DRS Service Provider, with the exception of level 0 activity which shall be delivered through the CSO.

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Parking	<ul style="list-style-type: none"> <li>Information and advice PCNs, permits and enforcement (emails for PCNs handled by NSL)</li> <li>Filter appeals</li> <li>Purchase, renew and replace parking permits, visitor vouchers and suspensions</li> <li>Referrals to highways team for abandoned vehicles</li> <li>Processing of suspensions</li> <li>Processing of payments and refunds for PCNs, permits, visitor vouchers and suspensions</li> </ul>	✓	✓	✓		✓	Delivered by CSO.
Children's Services (FYi)	<ul style="list-style-type: none"> <li>General enquiries / advice</li> <li>Signposting/ call transfer</li> <li>Send out information, leaflets</li> </ul>	✓		✓		✓	Delivered by CSO
Children's Services (school admissions)	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Specific admission enquiries (three (3) admission rounds: reception, secondary transfer and in-year)</li> <li>Send out applications / signpost</li> <li>Support completing applications</li> </ul>	✓		✓			Delivered by CSO

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Children's Services (social care switchboard plus for duty team) Deferred Service	<ul style="list-style-type: none"> <li>General enquiries, information and signposting to the duty team and allocated SWs</li> </ul>	✓					Currently not in Customer Services. Initial model to be implemented at the Deferred Services Commencement Date
Children's Services (overflow message taking for the recruitment lines for fostering and adoption) Deferred Service	<ul style="list-style-type: none"> <li>Signposting and call back requests</li> </ul>	✓					Currently not in Customer Services. Initial model to be implemented at the Deferred Services Commencement Date
Children's Services (education welfare)	<ul style="list-style-type: none"> <li>General enquiries and information (chaperone and licensing, work permits)</li> <li>Receive application forms (chaperone and licensing, work permits)</li> </ul>	✓	✓	✓		✓	Delivered by CSO

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Children's Services (youth services)	<ul style="list-style-type: none"> <li>General enquiries and information</li> <li>Enrolment to activities services offered: Duke of Edinburgh, Sports, Play Team, Positive Activities, Theatre</li> <li>Information regarding application process</li> <li>Issuing of questionnaires</li> <li>Targeted Youth Referral: Logging applications</li> <li>Technical support for Future Varsity</li> <li>Enquiries about Duke of Edinburgh scheme</li> <li>Complaints about school delivery of Duke of Edinburgh scheme</li> <li>Payment processing</li> </ul>	✓	✓	✓			Delivered by CSO
Assisted Travel (Blue Badges, Freedom Passes, Travel Vouchers)	<ul style="list-style-type: none"> <li>General enquiries / signposting</li> <li>Take application details (Blue Badges)</li> <li>Complete basic check / validation of details and identity</li> <li>Assess applications (can involve referral for medical assessment)</li> <li>Authorise the issuing of Blue Badges, and Freedom Passes</li> <li>Issue Travel Vouchers</li> <li>Take payment for Blue Badges</li> </ul>	✓	✓		✓	✓	Delivered by CSO

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Revenues	<ul style="list-style-type: none"> <li>General enquiries - including billing and banding</li> <li>Verification of documents (delivered at Barnet House and Burnt Oak offices)</li> <li>Process move in / out of the Authority</li> <li>Process change in circumstances</li> <li>Make a payment</li> <li>Request to pay by / change Direct Debit</li> <li>Enquiries regarding discounts, exemptions etc.</li> <li>Reminders and final notices - payment arrangements</li> <li>Status updates</li> </ul>	✓	✓	✓	✓	✓	Delivered by CSO
Benefits	<ul style="list-style-type: none"> <li>General enquiries (calls and face to face only)</li> <li>Verification of documents (Barnet House and Burnt Oak)</li> <li>Process break / change in payments</li> <li>Query correspondence / notifications</li> <li>Status update requests</li> <li>Checking supporting evidence prior to claim assessment (face to face only)</li> <li>Making appointments for claimants to see assessor</li> <li>Explanation of assessment letters</li> </ul>	✓	✓	✓	✓	✓	Delivered by CSO

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Registrars	<ul style="list-style-type: none"> <li>General enquiries and information (all plus nationality checking service)</li> <li>Complete basic check/validation of details</li> <li>Book appointments for registrars (births, deaths, marriages)</li> <li>Take payment for notice of marriage</li> </ul>	✓	✓	✓			Delivered by CSO
Governance	<ul style="list-style-type: none"> <li>General enquiries, signposting and advice on democratic process</li> <li>General information regarding SARs and FOIA requests</li> <li>Standards complaints (regarding Members)</li> </ul>	✓	✓	✓			Delivered by CSO
Libraries Deferred Service	<ul style="list-style-type: none"> <li>General enquiries and signposting</li> <li>Specific information requests</li> <li>Library transactions (reserve, renew, and over-due books)</li> <li>Booking events and IT sessions in libraries</li> </ul>	✓	✓	✓			CSO Transformation: to be migrated at the Deferred Services Commencement Date

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Adults Social Care and Health (Social Care Direct learning disabilities team, brokerage (meals at home), direct payments, financial assessments, mental health)	<ul style="list-style-type: none"> <li>General enquiries, information and signposting, including send out information and leaflets where required</li> <li>Advise / check / validate existing cases</li> <li>Act as a 'trusted assessor', following the trusted assessor framework, on behalf of the Authority. For example; this will enable the CSO to make decisions on eligibility and to identify those customers who are ineligible for an ASCH service and to divert them away from ASCH'</li> <li>Complete initial screening including simple assessments and risk assessments (for example in relation to mental health) to check eligibility for a service</li> <li>Initiate respite, rapid response or refer to SW / OT</li> <li>Create referrals for assessment and reassessment by SW and OTs on SWIFT and Wisdom</li> <li>Support completion of self assessment form and carers assessment form</li> </ul>	✓	✓	✓		✓	Delivered by CSO

## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Out of Hours (does not include Barnet Homes, noise and nuisance calls or Lifeline/ Telecare calls apart from Level 0 activity that will be delivered by the CSO) Deferred Service	Log out of hours incidents and refer for investigation General advice and signpost to other services Corporate complaints	✓					The Service Provider shall incorporate this function into the CSO by September 2013 or earlier if both parties agree. at the Deferred Services Commencement Date
Electoral Registration Deferred Service	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Registration process</li> <li>Taking people off register</li> <li>Proof of residency checks</li> <li>Request to purchase register</li> <li></li> <li>To meet or exceed the performance standards as set out in the Electoral Commission's 'Performance Standards for Electoral Registration Officers in Great Britain, July 2008'</li> </ul>	✓		✓		✓	Currently not in Customer Services. Initial model to be implemented at the Deferred Services Commencement Date
Electoral Service Deferred Service	<ul style="list-style-type: none"> <li>Canvassing</li> </ul>	✓			✓		The Service Provider to deliver the service in line with the elections cycle and as agreed through Schedule 15 Special Projects procedure
Election Call Centre	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Registration process</li> </ul>	✓		✓			The Service Provider shall provide this service as required by the Authority for general, local, regional and European elections



## Output Specification: Customer Services Organisation

Services	Scope of activity	Main Channel of Delivery for Level 0-2 Activities					Status
		Telephony	Web transactions	E-mail	Face to Face	Post	
Member enquiries	<ul style="list-style-type: none"> <li>General enquiries</li> <li>Status updates</li> <li>Take details / refer to back office</li> </ul>	✓		✓			Delivered by CSO
Web management	<ul style="list-style-type: none"> <li>All technical tasks required to support the Authority website as defined in the website transformation project business as usual task definition document listed in section 5 (Data Room Documents) of this Output Specification.</li> </ul>						The Service Provider shall deliver this service from the Service Transfer Date as part of the CSO function it provides.
Customer Insight Information	<p>The collection, collation, storage and analysis of Authority-specific information to support the Authority in:-</p> <ul style="list-style-type: none"> <li>Better targeting of marketing, communications to support self service and channel shift</li> <li>Commissioning and designing service to more effectively match need, paying 'due regard' to the public sector equality duty</li> <li>Continuous improvement in the delivery of service</li> <li>Understanding demographic change that impacts on service design</li> </ul>						The Service Provider shall deliver this service from the Service Transfer Date.

## 5 Data Room Documents

The parties recognise and agree that the inclusion of the Data Room documents in Schedule 1 (Output Specification) is for information only and is not intended to give rise to legally binding rights and obligations between the parties except where these documents are specifically referred to in Section 4 or 6 of this Output Specification.

Data type	File name	File contents	Function/s related to it
Service Level Agreements	Service Level Agreement Registrars v6 16122012 Service Level Agreement Parking v0 8 DF Service Level Agreement Libraries v2 14 Nov 12 Service Level Agreement Governance v3 Service Level Agreement FYI - final 211112 Children's Services FYI Addendum with Direct Me de-scope Jan 2013 Service Level Agreement ADULT SC v1 final revs and bens Service Level Agreement v1 14 11 12 Assisted Travel SLA v2 draft 20121109 ( Overarching SLA for all services V1 Information Sharing Agreement CSO and CS (Nov 12) (Draft) Children's Social Care Service Level Agreement v111 Nov 12 DRAFT EW SLA v1 draft 20121109 Youth Service Level Agreement v111 Nov 12 EPR SLA v1 draft 20121109	Details of all SLAs with other services	CSO
Strategy – Policy - Procedure	Customer Services Strategy final draft.doc	CSO strategy	CSO
	CSO Modelling data.xlsm		CSO
	Website Transformation Project - BAU Tasks - for dataroom.doc	Website transformation project business as usual task definition document which describes the tasks required to support the new Authority website	All
	Barnet Vision for customer Services - v2.0	A power point presentation that states the	CSO

## Output Specification: Customer Services Organisation

Data type	File name	File contents	Function/s related to it
	070212.ppt	customer service vision	
	Optimum basket of PIs version 9 070312.doc	The full suite of performance measures and other indicators of demand and response	All
	CST Business Case.doc	Outline of customer service transformation programme	CSO
	Future Operational Design - CCO v3 23 Apr 12.doc		
	Future Operational Design - R&B v1.2 2 Mar 12.doc		Revenues and Benefits
	Future Operating Design Adults Final.doc		Adults
	Future CSO Processes.zip (Additional maps not in FOD documents)		CSO
	Future Operating Design Electoral Registration		Electoral Registration
	Future Operating Design Children's Social Care		Children's
	Future Operating Design Housing		Housing
	Assisted Travel high level design 190911 Final		Assisted Travel
	Parking permits high level design and business case 0.3		Parking Permits
	Social Media Policy		CS008
<b>Volumetrics</b>	DRS Call volume.xls	Call volumes of development and regulatory services functions	DRS
	Final_2011_12_Report_MPenquiries_v.1.xls	Report regarding MP enquiries	MP Enquiries
	Four years BTS data.xls	Volumes of telephone calls over four years for all telephone lines across the Authority	All
	customer services_contactcentre_PI Telephony_2011_12_version_2.xls	Volumetric data for all the contact centres in the Authority for 2011_12.	Contact Centre
	customer services_Barnet House _facetoface_2011_12_version_2.xls	Volumetric data for face-to-face at Barnet House 2011_12.	Face-to-face – Barnet House
	customer services_Burnt Oak _facetoface_2011_12_version_2.xls	Volumetric data for face-to-face at Burnt Oak 2011_12.	Face-to-face – Burnt Oak

## Output Specification: Customer Services Organisation

Data type	File name	File contents	Function/s related to it
	customer services_contact centre_PI Email_2011_12_version2.xls	Volumetric data around emails to <a href="mailto:first.contact@barnet.gov.uk">first.contact@barnet.gov.uk</a> for 2011_12. Version 2 has the latest Q3 data.	Emails received into the <a href="mailto:first.contact@barnet.gov.uk">first.contact@barnet.gov.uk</a> inbox
	3 stage complaints procedure Barnet July 2011 v1.vsd	Complaints procedure for the 3 stage complaints process	Complaints
	Corporate Complaints policy.doc	Corporate complaints policy	Complaints
	CS complaints info for NSCSO.xlsx		Complaints
	Unreasonably persistent complainant policy.doc	Policy for unreasonably persistent complainants	Complaints
	Unreasonably Persistent Complainants Guidelines.vsd	Guidelines for dealing with unreasonably persistent complainants	Complaints
	HB process durations workbook 090312	Housing Benefits processes and durations of each process	Housing Benefits
	Ctax_Process Durations Workbook 120312	Council Tax processes and durations of each process	Council Tax
	Call Stats.doc		All
	Customer_Servies_First_Contact_EmailPerformance_2011-12.xls	Performance data related to emails received into the <a href="mailto:first.contact@barnet.gov.uk">first.contact@barnet.gov.uk</a> inbox	Emails received into the <a href="mailto:first.contact@barnet.gov.uk">first.contact@barnet.gov.uk</a> inbox
	Data Quality Sheet - Emails - 11.12.doc	Description of how data for the email PIs is collected, stored and who is responsible for gathering the data	Emails
	Data Quality Sheet - F2F Waiting - 11.12v2.doc	Description of how data gathered for the face-to-face PIs is collected, stored and who is responsible for gathering the data	Face-to-face
	Data Quality Sheet - Telephone - 11.12.doc	Description of how data gathered for the telephone PIs is collected, stored and who is responsible for gathering the data	Contact Centre
	Data Quality Sheet - Online Payments - 11.12.doc	Description of how data for the online payment PIs is collected, stored and who is responsible for gathering the data	All

## Output Specification: Customer Services Organisation

Data type	File name	File contents	Function/s related to it
	EMERGENCY PLAN 2011 ver1.1.doc		All
	Final_9597 LBB Corporate Performance Review 220211 to LBB.DOC	Corporate performance review	All
	Volumetric contact data for FOD v190412		All
	CSO Budget 2012-16 Final 170412	CSO budget plan for 2012-16	CSO
	R&B Budget 2012-16	Revenues and Benefits budget plan for 2012-16	Revenues and Benefits
<b>SLAs – Performance</b>	Customer_services_Customer_Satisfaction_Q3_2011_12_version_1.doc	CSO customer satisfaction scores for Q3 2011-12	All
	customer services balanced score card_2011_12_version_2.xls	The balanced scorecard for CSO, results for PIs for 2011-12	CSO
	Customer service_performance data_2011_12_version_2.xls	Performance Data for CSO for 2011-12	CSO
<b>Benefits Profiles</b>	Assisted Travel benefits profiles	Benefit profiles for Assisted Travel	Assisted Travel
	Parking benefit profiles	Benefit profiles for Parking	Parking
	CCO benefit profiles		Complaints
	R&B benefit profiles	Benefit profiles for Revenues and Benefits	Revenues and Benefits
	Adults benefit profiles	Benefit profiles for Adults	Adults
	Children's benefit profiles	Benefit profiles for Children's	Children's
	Electoral Registration benefit profiles	Benefit profiles for Electoral Registration	Electoral Registration
	Housing benefit profiles	Benefit profiles for Housing Benefits	Housing Benefits

## 6 Service Requirement

The following table indicates the service requirements for the Customer Services function.

The Service Provider shall adhere to the standards listed in the final column of the following table.

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
CS001	Customer Services Standards	The Service Provider shall adhere to the Authority's customer service standards in the delivery of the CSO function for all activities and all channels.		In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and PIs
CS002	Telephony	<p>For the telephony channel the Service Provider shall ensure that:</p> <ul style="list-style-type: none"> <li>• Calls are answered within twenty (20) seconds and answered as "Barnet Council".</li> <li>• As many contacts as possible are responded to by the Service Provider without being passed on to the back-office.</li> <li>• The number of public telephone numbers is reduced to as few as possible without impacting on customer satisfaction by excessive use of IVR.</li> <li>• All advertised call numbers are charged at local rates for the Authority's citizens regardless of the contact centre location.</li> <li>• Any use of IVR does not go deeper than three levels.</li> <li>• Services are open for a minimum of 9am to 5.15pm, Monday to Thursday and 9am to 5pm on Friday, not including Bank Holidays and the period between Christmas and New Year (save in the case of high priority services (street based services, children's services, registrars and</li> </ul>	Four years BTS data.xls as held in the data room	In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and PIs

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
		<p>adults' services) which as a minimum shall be covered at least from 9am to 4pm during the Christmas and New Year period).</p> <ul style="list-style-type: none"><li>• Business Continuity Plans are reviewed (and updated when necessary) at least bi-annually.</li><li>• The telephony channel is accessible to the diverse groups within the Authority's community, including (but not limited to) through the use of available technology to support those customers with specific needs.</li><li>• All relevant legislation is adhered to and all processes and systems are compliant with best practice (for example OfCom regulations, PCI compliance).</li><li>• Customers are sign-posted and supported to self-service facilities.</li></ul>		

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
CS003	Face-to-face	<p>For the face-to-face channel the Service Provider shall ensure that:</p> <ul style="list-style-type: none"> <li>All customers are met and triaged within five (5) minutes.</li> <li>During the Initial Term (unless altered pursuant to the Change Protocol and in accordance with the terms of the Agreement) the following face-to-face locations remain available to Service Users during the periods set out: <ul style="list-style-type: none"> <li><b>Burnt Oak Customer Service Centre:</b> 9am – 5pm Monday to Wednesday and Friday; 9am-7pm on Thursday.</li> <li><b>Barnet House ground floor reception:</b> 8.30 am – 5.15pm Monday to Thursday and 8.30 am - 5pm on Friday;</li> <li><b>Barnet House second floor reception</b> 9.00 am- 5.15pm Monday to Thursday and 9.00 am-5.15 pm on Friday; and</li> <li><b>Building 2, NLBP:</b> 8.30am – 5pm Monday to Friday</li> </ul> </li> <li>The opening times above shall not including Bank Holidays and the period between Christmas and New Year (save in the case of high priority services which as a minimum, shall be covered at least from 9am to 4pm during the Christmas and New Year period)..</li> <li>The number of staff engaged in the provision of the face-to-face services above prior to the Service Commencement Date are to remain unchanged and are to be Authority branded.</li> <li>Customers are sign-posted and supported to self-service facilities.</li> </ul>	<p>customer services_Barnet House _facetoface_2011_12_version_2.xls</p> <p>customer services_Burnt Oak _facetoface_2011_12_version_2.xls</p>	In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and Pls
CS004	Email and web information requests	<p>For the email and web information request channels the Service Provider shall ensure that:</p> <ul style="list-style-type: none"> <li>All contacts received by the CSO are processed (processed means logged, dealt with or passed on to the back-office) within two (2) Business Days.</li> <li>As many contacts as possible are responded to by the Service Provider without being passed on to the back-office.</li> <li>All contacts for which the CSO is responsible for providing a response are responded to within five (5) Business Days (if this is a holding response this shall indicate a timeframe within which a</li> </ul>	customer services balanced score card_2011_12_version_2.xls	In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and Pls



## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
		<p>final response shall be sent).</p> <ul style="list-style-type: none"> <li>All contacts where an extended timeframe is set are responded to within the promised timeframe.</li> <li>Well structured responses are sent using plain language that responds to all the points raised.</li> </ul>		
CS005	Web transactions	<p>For all web transactions which are received by the CSO the Service Provider shall ensure that:</p> <ul style="list-style-type: none"> <li>They are processed (processed means logged, responded to where appropriate or passed on to the back-office) within two (2) Business Days of receipt by the CSO.</li> </ul>	customer services balanced score card_2011_12_version_2.xls	In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and PIs
CS006	Post and fax	<p>For the post and fax channels the Service Provider shall ensure that:</p> <ul style="list-style-type: none"> <li>All contacts received by the CSO are processed (processed means logged, dealt with or passed on to the back-office) within two (2) Business Days of receipt.</li> <li>As many contacts as possible are responded to by the Service Provider without being passed on to the back-office.</li> <li>All contacts for which the CSO are responsible for providing a response are responded to within five (5) Business Days (if this is a holding response this shall indicate a timeframe within which a final response shall be sent).</li> <li>All contacts where an extended timeframe is set are responded to within the promised timeframe.</li> <li>Well structured responses to contacts which are the responsibility of the CSO are sent using plain language and responding to all the points raised.</li> </ul> <p>Post fulfilment and scanning activities are not within scope of the CSO. Customers' postal correspondence with other service partners will however be visible to CSO staff.</p>	customer services balanced score card_2011_12_version_2.xls	In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and PIs

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
CS007	Activity fulfilment	<p>The Service Provider shall comply with specific SLAs for delivery of the in-scope activities.</p> <p>The Service Provider shall comply with all relevant legislation, guidance and best practice regarding the in-scope activities.</p>		In accordance with customer care standards and as set out in Schedule 4 in relation to KPIs and PIs
CS008	Social Media	<p>The Service Provider shall adhere to the Authority's customer service standards and the Authority's social media policy in its use of social media.</p> <p>The Service Provider shall not open any social media channel without the prior express approval of the Authority's senior Officer for communications.</p>		<p>In accordance with authority customer care standards and as set out in Schedule 4 in relation to KPIs and PIs</p> <p>In accordance with authority social media policy</p>
CS009	Advocacy	<p>Where a delivery unit is unresponsive, the Service Provider shall escalate this to the relevant client function.</p> <p>The CSO function developed by the Service Provider shall act as the advocate for individual customers in dealing with service partners, ensuring level 0, 1 and 2 activity enquiries relating to specific service issues are responded to satisfactorily and that poor customer experiences are addressed by service partner.</p> <p>The CSO function developed by the Service Provider shall provide analysis of customer interactions as a whole and expertise in using this analysis to develop understanding on future service development and failure demand elimination.</p>		
CS010	Complaints	The Service Provider shall:		Corporate Complaints

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
		<ul style="list-style-type: none"> <li>Manage all level 1 and 2 corporate complaints regarding the activity of the CSO in line with the Authority's corporate complaints policy.</li> <li>Provide to the Authority all necessary information required by the Authority for stage 3 and Local Government Ombudsman complaints regarding the activity of the CSO in line with the corporate complaints standards.</li> <li>Provide to the Authority all necessary information required by the Authority (or third party partners) for the management and processing of corporate complaints at all levels in which the activity that is the subject of the complaint is not the responsibility of the CSO).</li> <li>Refer customers to the statutory complaints policy and procedure for statutory complaints related to adults' social care, health and children's services.</li> </ul>		Policy and Standards
CS011	Web content	<p>The Service Provider shall:</p> <ul style="list-style-type: none"> <li>Ensure that all web content pertaining to the activity for which the CSO is responsible is available on the Authority website and is updated in a timely manner.</li> <li>Identify where the Authority's web content is irrelevant, out of date or inaccurate and take action to notify the content owner and corporate communications so the content can be updated.</li> <li>Identify where the Authority's web content, although relevant, current or accurate, can be re-purposed for more effective contact handling and information provision and take action to notify the content owner and corporate communications so the content can be updated.</li> </ul>		
CS012	Access to data	<p>The Service Provider shall:</p> <ul style="list-style-type: none"> <li>Provide all performance information as set out in section 7 (Performance Indicators) of this Output Specification.</li> <li>Introduce methods for monitoring customer experience of other partners delivering Authority services and establish relevant contractual relationships with those partners.</li> <li>Provide such insight on customer experience and behaviour as the Authority requires for</li> </ul>		In accordance with Information Management Strategy and Data Flow Agreements

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
		<p>commissioning services and monitoring contracts.</p> <ul style="list-style-type: none"> <li>The Service Provider shall provide a single view of the customer, based on service interactions and the Authority's chosen corporate address database (currently NLPG/LLPG).</li> <li>Provide scheduled updates, access to systems and ad hoc data in a format and at a frequency that easily allows further analysis by the Authority's retained intelligence functions (to be defined by Authority's information management strategy / data flow agreements).</li> <li>Use reasonable endeavours to engage in projects and practitioner networks facilitated by the Authority's retained intelligence function.</li> <li>Use reasonable endeavours to supply management information to the Authority as required.</li> </ul>		
CS013	Service Level Agreements	The Service Provider shall abide by all SLAs between the CSO and Authority services/partners.	See SLA documents in data room	
CS014	Performance management	<p>The performance of the CSO will be monitored by the Authority in accordance with the targets agreed and articulated within a "Balanced Scorecard". The scorecard should include a combination of strategic and operational measures and refer to Authority's customer care standards.</p> <p>The CSO function developed by the Service Provider shall have in place appropriate procedures and controls for maintaining and storing documents, materials and records relating to the service.</p> <p>The Service Provider shall attend contract management meetings with the CSO's appointed performance management function as agreed from time to time.</p> <p>The CSO function developed by the Service Provider shall support the needs of the Authority in relation to independent audits and inspections, whether undertaken as a result of the Authority's own audit responsibilities or through independent inspection processes.</p> <p>The Service Provider shall attend cabinet and scrutiny committee meetings as requested by the Authority, at least on a quarterly basis, to present performance information to Members.</p>		In accordance with authority customer care standards and as set out in Schedule 4 in relation to KPIs and PIs
CS015	Brand	The Service Provider shall ensure that all interactions with the CSO are seen by customers as interactions with the Authority.		

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
CSO16	Democratic Engagement	<p>The Service Provider shall provide ward-level business intelligence information to ward Members to support them in their role as community leaders.</p> <p>The Service Provider shall provide a specific channel for Member enquiries and corporate complaints and shall respond to all enquiries within ten (10) Business Days.</p>		
CSO17	Website Management	<p>The Service Provider shall ensure that all the required technical tasks as described in the website transformation project business as usual task definition document listed in section 5 (Data Room Documents) of this Output Specification are completed.</p> <p>The Service Provider shall complete all management tasks as and when required to maintain the effective running of the Authority's website in line with the Authority's expectations.</p> <p>The Service Provider shall design the Authority's website so as to enable customer self-service.</p> <p>The Service Provider shall complete all other tasks in line with the SLAs.</p>		
CSO18	Knowledge Management	<p>The Service Provider shall:</p> <ul style="list-style-type: none"> <li>• Ensure that all knowledge management content pertaining to the activity for which the CSO is responsible is available to customer-facing staff and is updated in a timely manner.</li> <li>• Identify where the Authority's service input into the knowledge management content is irrelevant, out of date or inaccurate and take action to notify the content owner so the content can be updated.</li> <li>• Identify where the Authority's web content, although relevant, current or accurate, can be re-purposed for more effective contact handling and information provision and take action to update the content or notify the content owner (as applicable) so the content can be updated.</li> </ul>		
CSO19	Service Transition	The Service Provider shall provide a fully risk assessed implementation plan for the transfer of services.		
CSO20	Change Control	The Service Provider shall adhere to a change control process for any alterations made to service, systems or process changes.		

## Output Specification: Customer Services Organisation

Ref	Function	Service Requirement	Key volumes or frequency requirements	Applicable service standards
		The Service Provider shall submit to the Authority, for all proposed changes, the agreed level of notice and a full impact assessment (assessing the impact on CSO, retained/Back Office services and partners) of the change being proposed.		

### 6.1 Out of scope activities

The Service Provider shall not be required to perform the functions contained in the following table which shall be retained by the Authority:

Ref	Function	Service Requirement
CS020	Corporate complaints management	<ul style="list-style-type: none"><li>• The co-ordination, investigation and management of stage 3 and Local Government Ombudsman corporate complaints for all Authority services according to the corporate complaints policy</li><li>• Reporting of corporate complaints performance to the Authority's management board</li><li>• Development and review of corporate complaints policies</li><li>• Performance analysis and reporting of complaints activities in Authority services</li><li>• Co-ordination of training and development of complaints officers in Authority services</li><li>• Liaison with Local Government Ombudsman</li></ul> <p>Adult's and children's services statutory complaints will be managed by the relevant services. The interactions relating to these statutory complaints will be visible to the CSO (where appropriate and in line with data protection policy) to enable learning and performance management of other service providers by the CSO.</p>
CS021	Web content management	Individual services and partners will be responsible for providing and updating their respective web content.

## 7 Performance Indicators

The Authority's KPI and PI requirements are listed in the following table, but full details of methodology, baseline data, targets and reporting frequency are set out in Schedule 4 Payment and Performance Mechanism

Function	KPI or PI	Performance Indicators the partner shall be required to report against	Current baseline	2013/14 year end projections	Partner year 1 Quarter 4 target
Customer Service - Customer Satisfaction – Year 1 Proxy	KPI 10a	From Service Commencement - % Customer satisfaction with the contact centre telephone service, face to face service, web service & first.contact e-mail service.	58%	70%	70%
Customer Service - Customer Satisfaction – Year 2 onwards	KPI 10b	From Year 2 - % of customers who are satisfied or very satisfied with the service they have received post resolution (when their transaction has been fully dealt with), divided by all customers who completed a ' post resolution ' survey	TBC at SCD	TBC	TBC
Customer Service - First Contact Resolution – Year 1 Proxy	KPI 11a	From Service Commencement - % of contacts (Telephone calls, webforms & e-mails on CRM) where a contact has been resolved by the CSO or self service	TBC at SCD	50%	50%
Customer Service - First	KPI	From Year 2 - % of contacts (by channel, by service, by transaction type ( e.g. payment) and by customer group) where a contact has been fully resolved at first contact ( IE - By self	TBC at SCD	TBC	TBC



## Output Specification: Customer Services Organisation

Contact Resolution – Year 2 onwards	11b	service, by the CSO, without the need for referral to another department, or any kind of 'double handling' or future action, divided by the total number of contacts			
Customer Service - Customer Advocacy – Year 1 Proxy	KPI 12a	From Service Commencement – % of calls answered within 20 seconds	65%	80%	80%
Customer Service - Customer Advocacy – Year 2 onwards	KPI 12b	From Year 2 - % of cases closed within the specified service level.	TBC at SCD	TBC	TBC
Face to Face Wait Time	PI	Secondary wait time for customers to meet with Customer Service specialist at face to face locations  Performance will be reported for all specialist queues	7minutes  To be baselined at Service Transfer Date	To be maintained at baseline performance and improvement profile to be agreed with end target of 5 minutes	5 minutes
e-mail resolution	PI	Percentage of e-mails resolved within (10) business days for year 1 and responded to within five (5) business days from year 2.	90%  To be baselined at Service	90% based on 10 day target  To be maintained at	90% within 10 days

## Output Specification: Customer Services Organisation

			PI Transfer Date	baseline performance and improvement profile to be agreed	
Webform response	PI	Percentage of webforms responded to within relevant SLA ; General enquiries (5 days), or any other webforms with their respective SLAs which are handled by the CSO/NSCSO)	90%  To be baselined at Service Transfer Date	90%	90%
Complaints	PI	Percentage of Stage 3 complaints in relation to Customer Services upheld.  Performance will be reported for all services	0%	Not Known	10%
Member Enquiries	PI	% of Member/MP Enquiries responded to within 10 working days	90%	90%	90%
Average initial wait time for triage	PI	Average initial wait time for customers to be 'triaged' by a general customer service advisor, at all face to face locations (currently Burnt Oak Library and Barnet House).	To be baselined		Maintain baseline performance or better.

### Management Information Requirements

The Service Provider shall use its reasonable endeavours in meeting the MI requirements outlined below and these will be subject to change as agreed between the parties once the Insight and Co-design process set out in Schedule 2 Transformation Service Delivery Plan has been completed.

Indicator	Measure	Current Performance	Method of collation
-----------	---------	---------------------	---------------------

## Output Specification: Customer Services Organisation

Indicator	Measure	Current Performance	Method of collation
MI1	Avoidable Contact ( with reason codes) – consolidated, and by service/ activity, channel, and customer profile	No data – not currently captured	To be developed following CRM system implementation.
MI2	Subject reason and type of customer contact	No data – not currently captured	To be developed following CRM system implementation.
MI3	Mystery Shopping total information score (Telephone)	75%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
MI4	Mystery Shopping total attitude score (Telephone)	75%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
MI5	Mystery Shopping total delivery score (Telephone)	60%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
MI16	Mystery Shopping total timeliness score (Telephone)	70%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create

## Output Specification: Customer Services Organisation

Indicator	Measure	Current Performance	Method of collation
			the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
MI7	Mystery Shopping total professionalism score (Telephone)	75%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
MI8	Consolidated Telephone Score (Satisfaction)	65%	Data input to survey monkey by LBB and extracted into excel by CSO, who manually create the table of mystery shopping data.  The mystery shopping activity usually takes 1-2 days per month to process for all categories (not 1-2 days each).
	Total volume of contact (broken down by channel, activity and customer profile)  Face to face Telephone Web Email Letters	Volumes for: Emails – 2787 Letters - 51 Face to face – 20,676 Telephone - 245456 Completed web forms (Authority) 47	Current volumes for email and letters taken from FirstContact email statistics on CRM; face to face visitor statistics from Lonsto; telephone volumes from Cisco and web volumes from Jadu.

## Output Specification: Customer Services Organisation

Indicator	Measure	Current Performance	Method of collation
		45 (Q3 data) No data for customer profile.	
MI9	Website unique visitors	326,510 ( Q3)	AW stats – standard reporting on server log.
MI10	Number of active e-forms	100 (end of Q3 – December)	Jadu reporting– run standard query
MI11	Footfall (Barnet House)	9712 (Q3)	Data automatically generated by the Lonsto system installed at both sites
MI12	Footfall (Burnt Oak)	10964(Q3)	Data automatically generated by the Lonsto system installed at both sites
MI13	Number of MP and members enquiries	147 (Q3)	A combination of CRM reports and manual file checks
MI14	Number of complaints at stage 1	240 (Q3)	CRM report
MI15	Number of complaints at stage 2	32 (Q3)	CRM report
MI16	Number of complaints at stage 3	5 (Q3)	CRM report
MI17	Number of Local Government Ombudsman investigations initiated	19 (Q3)	CRM report
MI18	Percentage of complaints upheld at each stage (as a percentage of		CRM report

Indicator	Measure	Current Performance	Method of collation
	the total)		
MI19 Electoral Registration	90-95% of properties within the Electoral Boundary accurately entered onto the register	Not currently monitored	Draft – to be discussed during mobilisation
MI20 Electoral Registration	Registration completion rates	Not currently monitored	Draft – to be discussed during mobilisation
MI21 Electoral Registration	Percentage of 16 - 17 year olds included on the register as a percentage of the total population of that age group	Not currently monitored	Draft – to be discussed during mobilisation
MI22 Electoral Registration	Recorded errors on the register (number and nature of clerical errors recorded at the last major election/annually)	Not currently monitored	Draft – to be discussed during mobilisation
MI23 Electoral Registration	Number of voters registering online, via text (SMS), via post (1st or 2nd mailshot) and how many voters following a visit by an officer (canvasser).	Not currently monitored	Draft – to be discussed during mobilisation
MI24 Electoral Registration	Time from receiving an electoral registration application to confirming (to applicant) acceptance or refusal for addition to register	Not currently monitored	Draft – to be discussed during mobilisation
MI25	Percentage of web pages updated in the last month by service	Not currently monitored	Draft – to be discussed during mobilisation
MI26	Report of all broken links on the website by service	Not currently monitored	Draft – to be discussed during mobilisation
MI27	Percentage of calls successfully transferred to back office when	32%	No robust way of measuring back office transfers currently available. To be superseded by case

## Output Specification: Customer Services Organisation

Indicator	Measure	Current Performance	Method of collation
	required.		management.
MI28	Number and % of customers with 20+ contacts per year	No data – not currently captured	To be developed following CRM system implementation.
MI29	Number and % of customers with 2+ contacts per case	No data – not currently captured	To be developed following CRM system implementation.
MI30	Number of unique customers	No data – not currently captured	To be developed following CRM system implementation.
MI31	Report by subject, reason and type where mediated contact has increased by more than 5%	No data – not currently captured	To be developed following CRM system implementation.
MI32	Number of customers on the citizen index/single customer account	No data – not currently captured	To be developed following CRM system implementation.