

# Customer services standards

Staff guidelines, hints and tips



**Please follow these guidelines to ensure your customers receive a good and appropriate service when contacting the Council.**

## Telephone response guidelines



- ➔ When answering an **external call**, please give a polite greeting - state your department, Council's name and ask how you can help. For example – **'Good morning, Customer Services, South Derbyshire District Council, how can I help you?'**
- ➔ When answering an **internal call**, please state your department and name, together with a polite greeting.
- ➔ Before closing a call with a customer check you have answered their query in full and ask whether there is anything else you can help them with.
- ➔ If you have not answered their query in full, please give a timescale for when you will aim to contact them next, and outline how you will communicate with them (call them back, email, letter etc).
- ➔ Thank the customer for their call before ending each call.
- ➔ If you answer someone else's phone, please take a detailed message including:
  - Time of call.
  - Name and address of caller.
  - Number and email (where possible) of caller – please check this with the caller to ensure you record it correctly.
  - Brief description of reason for call.
  - Ask how urgent the call is and whether the caller needs a response by a set time.
  - Explain to the caller which team/officer you will forward their message to and provide their contact details.
  - Alternatively, where appropriate direct callers to a team telephone number/email inbox.
  - Please send the message in a timely manner to the relevant inbox/recipient.

Please follow our MTeams guide so your Teams voicemail is set up and follow the corporate formats detailed on pages 4 and 5.

## Telephone management guidelines - individual direct dials



**If you are not part of a hunt group or do not log into an IVR (Interactive Voice Recognition) system:**

- ➔ If you have a **softphone**, please include your direct dial telephone on your email signature. If your softphone is not receiving calls, please make sure your desk phone is plugged in. You will also need to check it is not set to 'do not disturb'. If you are unsure please speak to IT.
- ➔ If you **work mainly at home and do not need a softphone/handle external calls** (but have a desk phone at work that you do not use regularly), please do not include your desk phone number on your email signature. Instead please record a voicemail message on your desk phone that details an alternative route to service (for example your works mobile number, your email address, or the email address of a team inbox).
- ➔ If you **work flexibly**, both in the office, at home and on site, please record a detailed voice mail message on your desk phone, including an alternative route to service, so that customers know how to reach you when you are not at your desk.
- ➔ If you are **going on planned leave**, please record a detailed voice mail message including your return date and an alternative route to service on all your devices, including Teams.
- ➔ Alternatively, divert your desk phone to a colleague's work phone who will be available to take your calls whilst you are unavailable. **Please avoid diverting desk phones to works mobiles as it is costly. Speak to IT if this is absolutely necessary.**
- ➔ If a colleague **goes on prolonged sick leave** (2 plus days), please raise a Hornbill ticket to request their voicemail is forwarded to an email address (either a shared team inbox or the inbox of a colleague who can action any customer requests in their absence).
- ➔ Please check your voicemails across all your devices daily. Respond to any urgent queries immediately and respond to all others in a timely manner.

**Please ensure your voicemail message on all your devices follows the corporate format (see page 4) and is up to date at all times, including on your desk phone/softphone, works mobile and Teams.**

**[To find out how, read the telephone guides.](#)**

## Telephone management guidelines - hunt groups

**If your service area handles a large number of phone calls from customers, we recommend you set up a hunt group, so that customer calls will automatically hunt around your team's telephones.**

- ➔ If you are part of a hunt group please make sure you stagger your breaks to ensure there is always someone available to answer calls as part of the hunt group.
- ➔ Please plan annual leave across your team to ensure telephone calls are continually supported and continuity of service to customers is maintained.
- ➔ Please regularly review your voicemail message to ensure it is up to date and notifies customers of what to do if they need urgent support (for example a bank holiday or where all team members may be unavailable).
- ➔ Please check your voicemails daily. Respond to any urgent queries immediately and to all others in a timely manner.
- ➔ To set up a hunt group, raise a Hornbill request.



**Please follow the corporate voicemail message format:**

### **Standard message example**

- Hello, thank you for calling Bob Smith of IT services at South Derbyshire District Council. I am sorry I am unable to take your call. Please leave a message and I will get back to you as soon as possible. Alternatively, please email [it.helpdesk@southderbyshire.gov.uk](mailto:it.helpdesk@southderbyshire.gov.uk). Thank you for your call.

### **Planned leave message example**

- Hello, thank you for calling Bob Smith of IT services at South Derbyshire District Council. I will be away from my desk until Monday 5 June 2023. If your call is of an urgent nature, please contact the IT Service desk on 01283 595705 or email [it.helpdesk@southderbyshire.gov.uk](mailto:it.helpdesk@southderbyshire.gov.uk). Thank you for your call.



## Individual email inbox guidelines

- ➔ Please ensure your emails are courteous and written in [Plain English](#).
- ➔ Ensure your email is formatted in line with corporate guidelines, including the correct font and email footer. View our [email style guide](#) on Connect. Ensure your email footer is included on both internal and external emails.
- ➔ When setting up your email footer only include contact details you are readily available on. For example, if you work flexibly and do not have a softphone, please only include the details of your works mobile and email address. Alternatively include a team telephone number or service email address.
- ➔ Before going on **planned leave**, or if you will be away from your email for up to or more than one day, please ensure your 'out of office' is on. When you set your 'out of office' on Outlook it also automatically applies it to Teams.

### Please follow the corporate 'out of office' format:

Thank you for your email.

I am currently (out of the office/working on site) until (insert date) and will respond to you on my return.

If you need urgent support, please contact: (Include name and email address of relevant officer or central inbox)

Kind regards,

(Insert name and standard email footer)

- ➔ If you are on **sick leave** and can log on from home, please ensure your 'out of office' is on.
- ➔ If you are unsure when you will return from sick leave, please alter the corporate 'out of office' message to: 'Please accept my apologies as I am currently unavailable. If you need urgent support ...'
- ➔ If a colleague goes on **prolonged sick leave** (2 plus days), is unable to log on from home, and their 'out of office' is not on, please speak to your Head of Service and ask them to liaise with IT to action this.

## Service email inbox guidelines

- ➔ If your service area processes a large number of emails from customers (internal or external), we recommend you set up service inboxes with an auto-reply – for example [customer.services@southderbyshire.gov.uk](mailto:customer.services@southderbyshire.gov.uk)
- ➔ If you are unsure how to set up a service inbox or an auto-reply, please liaise with IT. Please ensure that service inboxes can be accessed by more than one member of the team.
- ➔ If your team has a service inbox we recommend you establish a service level agreement (SLA) that covers the main query types the inbox will receive – see page 7.
- ➔ Please ensure the SLA is included in the auto-reply email that the inbox sends to all customers.
- ➔ Please plan annual leave across your team to ensure the service inbox is continually supported and continuity of service to customers is maintained.
- ➔ If the service inbox will be unattended for more than 2 days (for example over Christmas), please update the auto-reply to let customers know how to get urgent support if they need it.



### **For example, the customer services auto-reply currently is:**

Thank you for your enquiry to South Derbyshire District Council.

This auto-reply is an acknowledgement of the receipt of your email. The Council aims to open all email enquiries during each working day, and will aim to reply to you:

- within 10 working days (general enquiries)
- within 15 working days (council tax, business rates and benefits enquiries)

At busy times, we are sorry, but we may not always be able to meet the above timeframes, however we will work to get you a response as soon as we can and as close to the timeframes as possible.

Kind regards,

The customer services team

## Service level agreements (SLAs)

- ➔ The purpose of a service level agreement (SLA) is to help set realistic and informed customer expectations, rather than to generate performance data that will be monitored and reported on externally.
- ➔ Depending on the service request type, SLAs can either detail how long it will take a team to respond to the customer, or how long it will take a team to process a request - for example 'we will aim to respond within 5 working days' or 'your application will be processed in 14 working days'.
- ➔ It is understood that in many areas daily monitoring of response times across the range of communication channels (phone, email, letter) is not currently technically possible.
- ➔ That said, as a manager of a service with an SLA in place, please monitor whether your service is meeting its SLA target(s), so auto-reply emails can be altered if response times change. In lieu of integrated systems, spot checks and mini audits can be a useful tool to check SLA target times are being met.



Long-term the Council aims to include service level agreements into integrated systems that inform customers and staff about the priority and target timeframes for requests, as well as keep track on how well the Council is responding and provide interim updates if target SLAs are missed or overdue.

- ➔ Ensuring all team members are aware of and try to work towards SLAs where possible is also vital. This will help to remind team members to contact customers if they are unable to meet SLA timeframes and to provide interim updates, where appropriate.
- ➔ For areas of high demand, or where complaints are prevalent, we recommend you speak to communications about publishing your SLA response times on the website. This will help to set customer expectations and assist with complaints. To do this, email [communications@southderbyshire.gov.uk](mailto:communications@southderbyshire.gov.uk)

## Webform guidelines

**If your service receives a number of customer enquiries through webforms, please follow these guidelines to ensure your customers receive a positive experience.**



- ➔ Please direct web forms into a service inbox, rather than to an individual's inbox. Please ensure that service inboxes can be accessed by more than one member of the team.
- ➔ Please ensure auto-reply emails include an SLA so your customers know what to expect (see page 7).
- ➔ Where an auto-reply email is already in place, please review this and include an SLA where appropriate.
- ➔ Please also review each form introduction page on the website ([www.southderbyshire.gov.uk](http://www.southderbyshire.gov.uk)) to consider including an SLA, so customers know how long it will take to receive a response before filling in a form.
- ➔ Remember if your SLAs change you will need to review the auto-reply messages and form introduction pages to ensure they remain up to date.
- ➔ For support changing and updating form introduction pages, please email [communications@southderbyshire.gov.uk](mailto:communications@southderbyshire.gov.uk)

## Post guidelines

- ➔ Please check the letter templates your team is using (including those stored in systems and rarely used) to ensure they contain up to date corporate branding and the [www.southderbyshire.gov.uk](http://www.southderbyshire.gov.uk) web address. **[Download the latest letter templates](#)** from Connect.
- ➔ If you work flexibly and send letters to customers, why not find out about **[our ePod system](#)** that allows you to send letters (using pre-defined templates or supplied PDFs) from your computer. These letters are printed and despatched by our partners PHD to the correct mailing standards. To find out more about ePod, email **[customer.services@southderbyshire.gov.uk](mailto:customer.services@southderbyshire.gov.uk)**
- ➔ If you cannot send via ePod, please make sure you use barcoded window envelopes. You can collect these from the post room. Please always enclose a letter with a typed address that shows through the window. **Do not handwrite the address on the envelope or put a sticker over the window envelope.** This does not look professional and does not conform to the correct mailing standards.
- ➔ If you are returning original documents to customers (for example birth certificates), please ensure you include a covering letter, so the customer knows who has returned their items to them, and who they belong to if the item gets lost. **Please return valuable items (such as passports) using recorded delivery.**



Please note, the [www.south-derbys.gov.uk](http://www.south-derbys.gov.uk) web address no longer works, so it is vital any references to this web address are changed.

# How to serve customers well



**We spoke to the customer services team who serve customers non-stop throughout the day. Here's their top tips on how to serve customer well.**

**These tips are not exhaustive but give a good guide about what to think about and how to act. These and many more will be covered in the mandatory Customer Care training courses that will be available to all staff from Summer 2023.**

## Follow the customer's lead

Address a customer in the same way they introduce themselves. For example, if they introduce themselves as Mr or Mrs Smith, follow suit. If they address themselves by their first name, do so too. Try to avoid sir or madam, as it is very formal and less friendly.



## Smile, even when on the phone

It's amazing what difference smiling can make to how effectively you serve with a customer, even over the phone. Your voice accounts for 84% of your effectiveness on a phone but only 33% when face-to-face.

## Make sure you are informed

Look at the system notes whilst on your call. This helps you look at the history of the customer's interaction with the Council, helps with giving updates and is a really good and easy way of dealing with customers. It also helps to reduce repeat calls and duplication of workloads.



## Listen, be patient, and pay attention

Capture contact details and specifics on a notepad or straight into a system, so you can refer back to them at the end of the call. Doing so gives customers confidence and means if you are called away unexpectedly you won't forget vital information.

## Give realistic timescales and don't over promise

With regards to processing and response times, check service level agreements (SLAs) before giving customers an indication of how long things might take. Above all, don't give unrealistic timescales or overpromise. If you don't know what the SLA is, don't give one.



## Always keep system notes up to date

Always update system notes – no matter if you think you are too busy. If you don't update system notes other members of your team and other teams won't be able to answer queries in future. This will lead to repeat calls, duplication of effort and customer frustration.



# How to serve customers well



## Don't be afraid to double check

If you are not sure you have heard or captured everything correctly on a call, don't be afraid to reconfirm details with the customer. It's better to ask again than end the call and think: 'did I take that information down correctly'?

## Put yourself in a customer's shoes



Try to put yourself in a customer's position. If a customer is getting upset, think why that might be – are they at risk of losing their business or home? Putting yourself in their shoes does not necessarily mean you will change policies or processes to help them, but it will help you to empathise and support them as well as you can. When empathising, do not bring your own personal feelings/experiences into the discussion. Stay professional at all times.

## Always think data protection

Ask the relevant security questions to confirm a customer's identity before giving out any confidential information.

If in doubt, it's perfectly ok to explain that you haven't been able to confirm their identity and ask them to confirm it another way, or to offer to post/email the information to their registered address.



## Take extra care

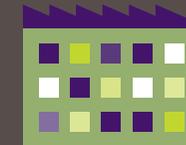
Be patient and take time to understand what customers are saying, for example if English is not their first language or they are struggling to communicate clearly.

Be detailed, for example ask them to spell their name and address (use the phonetic alphabet if you can). Customers would much rather you ask them and get it right than try and muddle your way through the call and then issue documents with misspellings etc.



## Correct system details

Check and update customer contact details within any of the systems you use. If you see contact details have changed please update them there and then. This helps keep the databases fresh and up to date.



## Don't forget that internal customers (your colleagues) are as important as external customers

Often times your colleagues may be contacting you for information they are providing to an external customer. Offer them the same timely service.

## More ideas?



### Be open and transparent

Avoid quoting the word policy as a quick easy fix to explain why the Council can't give a customer what they need. Avoid: "well according to our policy etc ...".



Try to explain the reason behind the policy to help the customer understand why the Council can't satisfy their request and offer alternatives where possible.

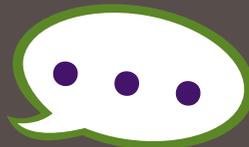
### Take ownership

Make a customer feel you are taking ownership of their issue, even if you need to transfer them to a colleague. If you end up transferring the enquiry, ensure the customer knows who you are referring their query to, give out the direct dial number and email address of the team you are transferring them to. Send a detailed message.



### Don't be afraid to explain again

If you have provided advice and you feel the customer may not have understood for whatever reason, ask them if they are ok with everything that has been explained to them. Don't be afraid to explain again, but make sure you don't come across as patronising. Say things like, "Was I clear enough? Do you want me to run through it once more?"



### Support for customers with additional needs

Make yourself familiar with the services the Council offers for customers with additional needs – from the SignLive system that offers British Sign Language translation for customers, through to interpretation or translation services. If in doubt check out Connect for more information or don't be afraid to ask for advice: [customer.services@southderbyshire.gov.uk](mailto:customer.services@southderbyshire.gov.uk)



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