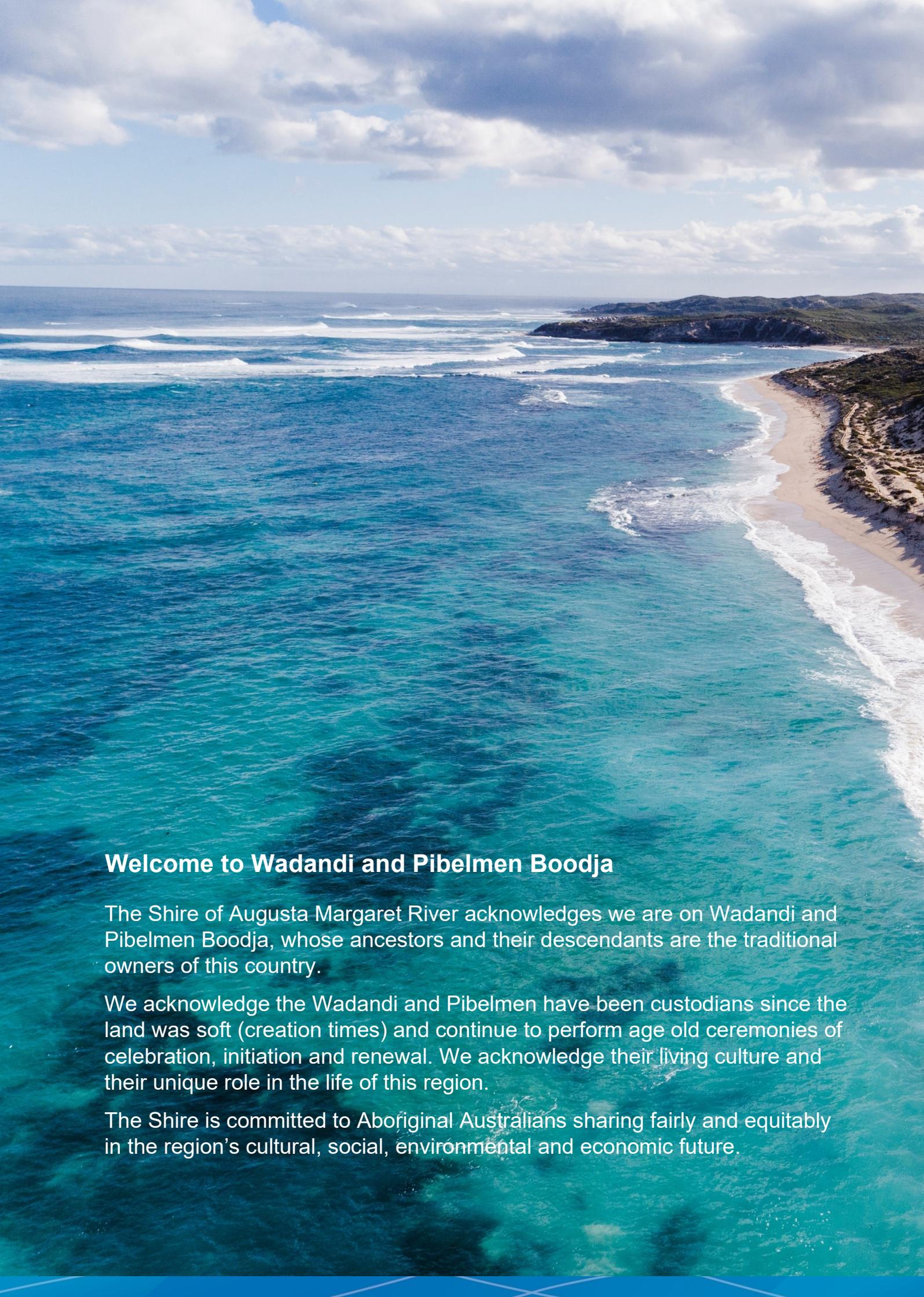




# Customer Experience Strategy 2023-2027





## **Welcome to Wadandi and Pibelmen Boodja**

The Shire of Augusta Margaret River acknowledges we are on Wadandi and Pibelmen Boodja, whose ancestors and their descendants are the traditional owners of this country.

We acknowledge the Wadandi and Pibelmen have been custodians since the land was soft (creation times) and continue to perform age old ceremonies of celebration, initiation and renewal. We acknowledge their living culture and their unique role in the life of this region.

The Shire is committed to Aboriginal Australians sharing fairly and equitably in the region's cultural, social, environmental and economic future.

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## Background and Context

Positioned within the picturesque south-west corner of Western Australia, the Shire of Augusta Margaret River is dedicated to serving the vibrant community of approximately 17,000 residents who call this region home.

We recognise the importance of staying responsive and proactive in addressing the evolving needs and expectations of community members and have embarked on a journey to strengthen our ability to meet these needs and expectations over time, by establishing our first Customer Experience Strategy 2023-2026 (CX Strategy).

### The journey ahead

Although we are in the early stages of our CX journey, the Strategy shows our commitment to prioritising the needs and experiences of the community. The first three years establish a solid foundation of customer experience understanding.

Looking ahead, the focus will shift towards maintaining and optimising the customer experience, with continued input from the community and our staff to ensure the CX Strategy adapts to ever-evolving needs.



## Our Vision

We make interactions easier for our residents, businesses, and visitors by fostering a customer (community) centred culture across the organisation underpinned by a continuous improvement mindset.

## Purpose

The Strategy provides the framework to deliver services in a way that keeps the Shire's community and customers at the centre, while also meeting the organisation's operational and strategic goals.

## Strategic Alignment

This Strategy aligns with the Shire's Strategic Community Plan 2040, specifically focusing on addressing Performance Outcome **PF2: Community and Customer Focus**, and Performance Outcome **PF4: A Culture of Innovation, Quality and Continuous Improvement**.



## What does customer experience mean at the Shire?

Customer experience (CX) is the overall perception a customer or community member has about the Shire, made up of single interactions and ongoing engagements with our services, systems, staff and Council. Customer experience can often be confused with customer service.

### Customer Services vs CX

Customer service can be viewed as one fragment of an entire customer journey, while customer experience encompasses all the interactions between the Shire and a customer or community member over time.

### Why focus on CX?

Focusing on customer experience enables the Shire to create more memorable and consistent services. The core objective is to create meaningful interactions that go the extra mile in making our community feel genuinely heard, understood, respected, and valued.

The community and staff have both expressed there are often more important values to uphold than simply ensuring a customer is satisfied. While the Shire will measure customer satisfaction, we recognise the significance of values such as feeling heard, respecting people's time and opinions, and engaging authentically as additional indicators of achieving our goals.

### Customer Service as part of Customer Experience

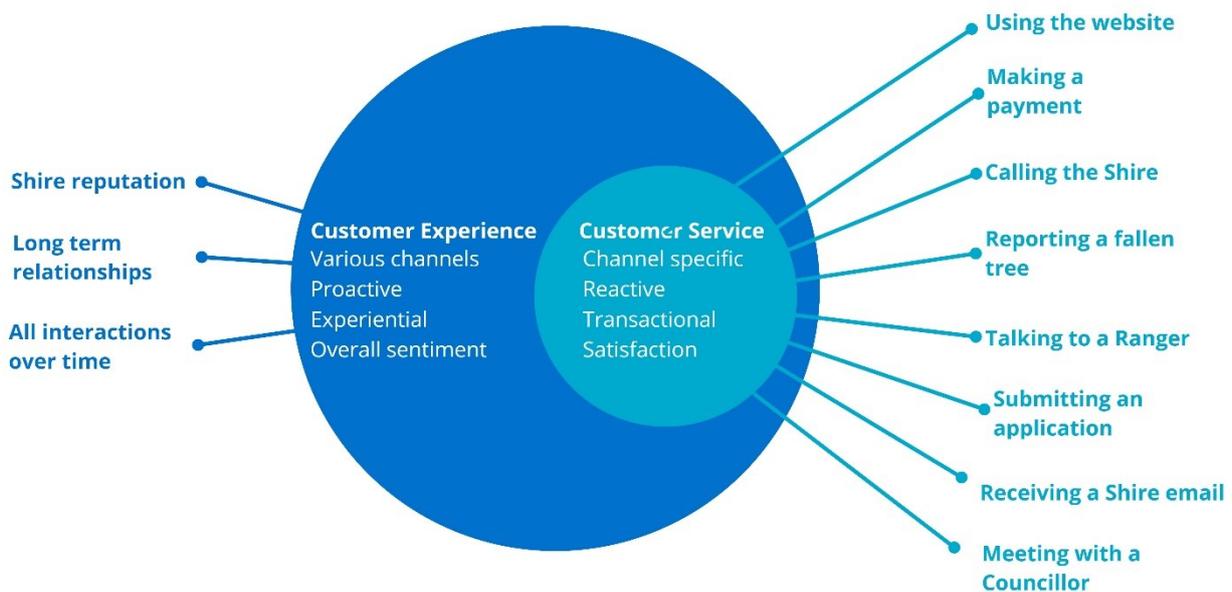


Fig.1 Each customer service interaction that a customer has with the Shire has an impact on the overall customer experience.

## How the Strategy was developed

The Shire applied a Human-Centred Design (HCD) method to develop the CX Strategy, by actively listening to both staff and a small group of community members (representative of a cross section of the community), using their feedback to shape the approach. Through workshops and interviews the Shire gathered over 4,000 data points, representing a diversity in views and opinions.

These data points were analysed to gain a deeper understanding of the current customer experience challenges and opportunities with the Shire services.

### Overview of research activities

The Customer Experience Strategy 2023-2026 has been informed by a combination of activities including:

- Engagement with staff and community
  - 4 workshops with community members, 11 participants
  - 5 in-depth interviews with community members, 5 participants
  - 16 workshops with Shire staff, 52 participants
- A review of other local government CX Strategies
- A review of best practice and emerging trends in Customer Experience <sup>1</sup>
- A review of Shire data sources
  - Service request data
  - Website analytics
  - Staff survey
  - Community Perceptions Survey Results
- A desktop review of Shire publications and documentation
  - Strategic Community Plan 2040
  - Corporate Business Plan
  - ICT Strategic Plan 2023-27
  - Customer Service Charter
  - Complaint Handling Policy

By collecting and analysing staff and customer data from various sources, the Shire developed a comprehensive understanding of customer experiences. Engaging with people in this way has enabled the community voice to be deeply and authentically integrated into the Strategy and this method of engagement will continue to guide actions over the next three years.

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<sup>1</sup> Qualtrics, Neilson Norman Group, Nesta

# Guiding Values

The Shire's Organisational Values guide the delivery of this Strategy:

Respect	Integrity	Community	Excellence
<p>We acknowledge our culture, environment and community, whilst ensuring our behaviour has a positive impact.</p>	<p>We have the courage to do the right thing and be transparent in our decision making.</p>	<p>We focus on supporting positive collaborative relationships that connect our communities to deliver great outcomes for the wider community.</p>	<p>We are committed to providing a high level of service to our customers and are open to opportunities and change.</p>

## What does this look like from a customer perspective?

- Invest time to listen to me.
- Provide an appropriate emotional response.
- I feel my opinions are taken seriously.

- Do what you say you will do.
- Keep me informed.
- Use plain English, not jargon.
- Agree timings with me.
- Provide information openly and honestly.
- Apologise for mistakes made. Make it warm and sincere.

- Show me that you care.
- Take ownership of my issue.
- Take the time to explain decisions.
- Solutions are designed together.

- Go the extra mile if needed.
- Surprise me in how well you address my request.
- If things go wrong, respond quickly.
- Keep trying to improve what you do.

## What we have heard (so far)

From the community and staff		
Both staff and the community feel that the <b>human connection</b> is important, recognising and treating each other as people.	We all value <b>transparency and openness</b> in any situation, but in communications between the Shire and community, it works both ways.	In process, communication and service delivery, <b>consistency</b> matters to staff and the community. Customers know what to expect and Staff have a clear path to follow.
From the community		
 <p>The community wants <b>to feel heard</b>, and that Council and the Shire is listening to their needs and interests. They want to have an understanding of council decision-making processes and considerations.</p>	 <p>The community has a strong desire to feel a sense of connection with the Shire and the people who act on behalf of the organisation and serve the community. <b>Connection on a personal level is deeply valued</b> and the community get this sense when staff are empathetic and personable.</p>	 <p>Community members acknowledge the Shire can't always deliver a positive outcome, and sometimes it is more important to be informed and know the outcomes are <b>thorough, appropriate &amp; justified</b>.</p>
 <p>Community members recognise when the Shire <b>values their time</b> - they notice this when enquiries are responded to quickly, as well as when enquiry updates keep the person well-informed of the progress of the enquiry.</p>	 <p>The community is passionate, highly engaged and <b>want to contribute</b> to local council decision-making. Community members value transparency throughout council decision-making processes and want to know the community is referred to regularly.</p>	 <p>Community members value the guidance and support the Shire can provide when they <b>partner together</b> to navigate a complex process.</p>
From staff		
 <p>Increasing <b>customer expectations</b> of the Shire's services.</p>	 <p>Staff want to work in a <b>more connected</b> way, especially when collaborating between business units to get information to a customer.</p>	 <p>Staff voice a desire to embed a <b>community-centred mindset and approach</b> in day-to-day processes at the Shire.</p>
 <p>There is a lack of <b>consistency in internal Shire processes</b>, which negatively impacts service delivery. Communication is cited as a critical challenge area requiring consistency.</p>	 <p>Staff acknowledge that it is not always possible to give the customer what they want, but that it's still possible to deliver a <b>positive customer experience</b> by focussing on delivering other valuable outcomes, such as making sure the customer is listened to and kept informed.</p>	 <p>Staff recognise the value in <b>including the community in decision-making</b> to improve services and believe community engagement needs to be conducted in an authentic and collaborative way.</p>

## The Strategy

Building on what we've heard so far and combining with best practice research, four themes will continue to inform our decision making and actions, with leadership as an overarching function.

### These themes are:

- Build a customer centric culture
- Optimise processes, information and services
- Improve technology and systems
- Use customer feedback to drive improvements

Each theme has several related outcome areas, and associated actions (see page 11) aimed at improving customer experiences.

## Leadership

Leadership is an overarching function and crucial to the success of the strategy as it requires ongoing dedication and active sponsorship from all operational leaders and the Council. The aspiration is to have leaders who prioritise customer experience and community needs, ensuring that staff understand their roles and make community-centric decisions to enhance overall customer experience capability.





## Theme 1: Build a customer centric culture

### The research showed that...

The community wants to be involved in decision making and feel heard. Our staff care about the community they work in and are also keen to take up further opportunities to put the community more clearly at the centre of the services provided.

### Our current challenges are...

Due to the diverse and multi-functional nature of services provided, teams can at times find it challenging to coordinate and respond to complex customer enquiries.

### So we're going to focus on...

Building a culture that has community at its centre, which encourages collaboration, empathy and understanding, with values and behaviours that focus employees on delivering great customer experience through these **Focus Areas**:

- Leading a culture of exceptional customer experience
- Empowering staff through CX training opportunities
- Developing tools that enable staff to build empathy with the community



## Theme 2: Optimise processes, information and services

### The research showed that...

Consistency is important to both customers and staff. For customers it's about knowing the response from the Shire is authentic and just; they are treated the same as others in the community. For staff it's about streamlining processes to better enable consistency and the ability to provide positive experiences. Equally as important is valuing customers' time and the need to constantly shift to meet ever evolving needs.

### Our current challenges are...

Some of our processes could be streamlined to provide better consistency and structure, and to ensure customer enquiries are delivered in a way that recognises the importance of our customer's time.

### So we're going to focus on...

Striving to ensure our processes and information is clear, consistent transparent and easily accessible. We value customers' time by aiming to resolve enquiries at the first point of contact through these **Focus Areas**:

- Streamline multi-channel customer enquiries to improve first point contact resolution
- Deliver welcoming, transparent and consistent customer-centric communications
- Provide customers with timely, consistent and reliable service



### Theme 3: Improve technology and systems

#### The research showed that...

Personal connection is a key factor in the relationship between the Shire and the community. Staff want the community to recognise them as people who are part of the same community as those that they serve. The community value the connection that allows them to feel seen and heard. There is a concern that through technology, the personable qualities may be lost.

#### Our current challenges are...

Current systems make it challenging for staff to manage customer interactions and easily find information to resolve customer queries. These systems no longer support the direction we want to take and at times lack common integrations.

#### So we're going to focus on...

Improving our systems to better share knowledge and to design interactions that are seamless and easy for customers and staff through this **Focus Area**:

- Identify technology enhancements for a faster and more reliable customer experience



### Theme 4: Use customer feedback to drive improvements

#### The research showed that...

The community want to work together with the Shire and know that community thoughts and opinions have been considered in decisions made by Council. Staff acknowledge that while collaborating with the community takes time, it is well worth the process and the results.

#### Our current challenges are...

Currently, limited data is captured that continuously evaluates customer services and customer experiences. This makes it difficult to provide evidence that supports what the community think, feel, say and do when customers are having one-on-one interactions with Shire staff.

#### So we're going to focus on...

Increasing our understanding of customers and the community, and use that knowledge to design services that improve our customers' experiences with us, through these **Focus Areas**:

- Collect and utilise customer experience data
- Integrate human-centred design principles as part of project delivery

## Focus Areas and Actions

If the Strategy sets the destination, it's essential to have a clear understanding of the path and indicators of success at each stage.

The following pages outline a set of related Actions corresponding to each Focus Area identified in the Strategy.

While the Themes and Focus Area statements should stay stable across the period of the Strategy, the actions required may evolve.

Timeframes provided in this Strategy are approximations based on the relative priority of the actions in the context of the Strategy as a whole, and considering alignments with other related strategies, including the ICT Strategy.

Key	
	<b>Theme 1:</b> Build a customer centric culture
	<b>Theme 2:</b> Optimise processes, information and services
	<b>Theme 3:</b> Improve technology and systems
	<b>Theme 4:</b> Use customer feedback to drive improvements

### Focus Area: Lead a culture of exceptional customer experience

Theme	Action Item
	1. Hire for customer experience mindset and approach
	2. Trial a recognition scheme for staff delivering great customer experience
	3. Quarterly customer experience presentation from Senior Leaders to Executive (ELT) including initiatives and trends
	4. Shire Executives promote customer experience focus areas



5. Deliver a project that exemplifies the benefits of customer experience as a Case Study for further opportunities



6. Review and update Customer Experience Strategy

**Focus Area: Empower staff through CX training opportunities**

**Theme    Action Item**



7. Provide CX and human-centred design methods training that is accessible and relevant to all staff



8. Introduce new and existing staff to CX by creating an induction



9. Establish a group of CX Champions as a peer support group who meet bi-monthly and maintain regular contact

**Focus Area: Develop CX tools that enable staff to build empathy with the community**

**Theme    Action Item**



10. Map the top three most frequent and three complex customer journeys and share artefacts with key internal stakeholders



11. Develop a suite of community personas that provide a representative snapshot of the Shire's customers



12. Develop methods for researching, designing and creating CX tools, artefacts and processes

**Focus Area: Streamline multi-channel customer enquiries to improve first point contact resolution**

Theme	Action Item
	13. Map the touchpoints, channels, responsible teams and volume of customer enquiries
 	14. Conduct an assessment of customer service knowledge management (Inc A-Z guide)
 	15. Optimise knowledge management systems based on the outcomes of the assessment (#14)
 	16. Use customer request data and website analytics (#34) to inform opportunities to improve the website content, enabling self service
 	17. Review call handling processes including voicemail, work groups, Interactive Voice Response (IVR) and identify customer and staff requirements of a new phone system
	18. Deliver improvement opportunities identified in the phone system review (#17) that do not require a new system
 	19. Review current customer service processes (non DoT) and identify opportunities to standardise, streamline and automate
	20. Investigate options to create a centralised contact centre
	21. Add Customer Service Standards to the Customer Service Charter and write a Community and Stakeholders Engagement Charter

## Focus Area: Deliver welcoming, transparent and consistent customer-centric communications

Theme	Action Item
	22. Create a brand voice and written style guide document that provides staff with an outline on how to adopt the Shire voice
	23. Review existing Welcome Pack for new residents, consider making multi-channel
	24. Empower staff to provide transparent and consistent information to customers, such as sharing timelines, steps in a process, and responsible officers

## Focus Area: Provide customers with timely, consistent and reliable service

Theme	Action Item
	25. Implement improvements to the top three most frequent complex customer journeys

## Focus Area: Identify technology enhancements for a faster and more reliable customer experience

Theme	Action Item
	26. Conduct a website usability review to optimise navigation and ID issues
	27. Implement website changes based on usability review (#26)
	28. Review current payment methods and investigate modernised payment options



29. Integrate CX journey mapping techniques with the 'as-is' business process mapping in the ICT Strategy

### Focus Area: Collect and utilise customer experience data

#### Action Item



30. Establish current state baseline customer experience metrics for key services and channels



31. Set up and collect continuous data at moments that matter (identified in journey mapping #16)



32. Implement post customer service survey with CSAT score



33. Define process for customer experience projects that standardises baseline customer experience measures, collect qualitative research data and measure post-implementation impact – outlining options for engaging the community throughout the project



34. Set up website analytics to collect meaningful information and generate reports (See supporting documentation for specific items.)



35. Catalogue CX data and create a central database for secure storage

### Focus Area: Integrate human-centred design principles as part of project delivery

#### Action Item



36. Include human-centred design methods within project management framework

## Our CX Journey

This Strategy is the Shire's first formal step on a CX journey to becoming a mature customer-centric organisation. Though the Shire is in the early stages now (as per the Qualtrics Maturity Assessment we are in Stage 1: Investigate. See Appendix for more details), this Strategy focuses on setting up a foundation that will enable more ambitious and innovative customer initiatives in the future.

The initial three years include Action Items that are achievable in the short-term, will positively impact the customer experience, and assist in building awareness and engagement with Shire staff.

Once a solid foundation is established, the next 3-6 years can focus on:

### **Building a customer centric culture**

- CX Champions become vocal spokespeople for the value in working in a community-centred way
- Using data from this Strategy to inform the next iteration of the Strategy
- Leaders in the organisation speak more clearly and openly about community needs and have evidence to support the Shire's views and actions
- Including customer experience attributes and actions included in all staff PDs

### **Improving technology and systems**

- Collecting more data and having a deeper understanding of the evolving needs of the community
- Optimising a modern CRM system
- Optimising a modern phone system
- Automating processes that have been streamlined and made more consistent

### **Optimising processes, information and services**

- Setting up a continuous improvement pipeline
- Sharing customer service metrics with the public

### **Use customer feedback to drive improvements**

- More sophisticated data collection that is shared and utilised often
- Automation of surveys and customer feedback on multiple services and channels
- Collecting data and feedback across a range of moments that matter
- Implementing a Voice of Customer program

## Appendix

### Some definitions

#### Quantitative

Numerical based customer experience data, such as a Customer Satisfaction Score, or  $\frac{3}{4}$  people agree that the Shire is a great place to live.

#### Qualitative

Anecdotal customer experience data such as open text comments in surveys, quotes from customers, and narrative interviews.

#### Discreet

Customer experience data collected for a single or specific purpose, usually to inform a project, strategy or service.

#### Continuous

Regular and often automated collection of customer experience data at predetermined intervals, such as a post-service survey.

#### Baseline

Baseline data is the kind of information you collect at the start of a project or change so you can compare data taken after the change to determine if the desired improvement was achieved..

#### Benchmark

A benchmark is often used to measure against a set of industry standards, best practices, or comparable organisations. Benchmarks can also be internally set to be based on the Shire's own ideals and targets.

#### Voice of Customer Program (VoC)

The purpose of a VoC program is to gain deep insight into the community's needs, expectations, and perceptions of the Shire and how it provides services, regulates compliance, facilitates community input, advocates for the community and funds programs.

It often includes data collection, analysis, action planning, implementation, and continuous improvement. The main role it plays in a Customer Experience Strategy is setting up the approach to *listening* to the community.

#### Interaction

An interaction can occur directly between Shire staff and community individuals or it can occur through Shire online and physical communications. Some examples where an individual may have an interaction with the Shire include making a phone call to report an issue, checking the website for burning off periods, or visiting the Shire offices to pay a pet registration.

## Our metrics

Measure	What is it	How is data collected	How it looks
<b>Customer Satisfaction Score (CSAT)</b>	The CSAT score measures a customer's satisfaction with an interaction or service.	Question in a survey	'How satisfied were you with your visit to the library today?'
<b>Customer Effort Score (CES)</b>	The CES score measures how much effort a customer had to put into achieving a task.	Question in a survey	'How easy was it to get the information you needed?'
<b>Net Promoter Score (NPS)</b>	The NPS score determines a number for how likely people are to talk positively about the Shire and promote it positively to other people.	Question in a survey	'On a scale of 1-10, how likely are you to recommend the Shire as a good place to live?'
<b>First Call Resolution (FCR)</b>	Measures the percentage of first contact via phone, email and in person that can be resolved at that time	Call data, in person data and email data analysis	n/a
<b>Value Add Time</b>	A measure for processes that compares time that is spent on activities that add value (as perceived by the customer) activities, rather than non value add such as background admin tasks	Data collected in a short representative time and analysed	n/a

The CSAT and CES score are the core metrics of the Measurement Framework. Together, these metrics provide us with a view of customer sentiment (which we aim to be positive) and customer effort (which we aim to be easy). The way we meet the needs of the community goes beyond just these two measures, so additional measures should be implemented where appropriate to build a stronger understanding of customer experience. These additional measures focus on capturing the values of both staff and the community identified as being important:

- Feeling heard
- Respected in time and opinion
- Being able to engage
- Entire journey and overarching experience
- Transparency and openness

## Customer Experience (CX) Maturity Assessment

CX Maturity refers to the level of integration and effectiveness of an organisation's customer experience practices. To measure the Shire's progress in becoming a more customer-centric organisation, we applied a CX Maturity Model.

The CX Maturity Model chosen to assess the Shire's progress in becoming a more customer-centric organisation is the Qualtrics XM Maturity Model. The Qualtrics model was chosen because it is a widely used assessment tool with easy-to-follow organisational benchmarks.

The Qualtrics CX Maturity Assessment allows us to determine where the Shire's customer experience performance is positioned on a five-stage maturity model made up of the following stages:



There are many benefits of an organisation applying a maturity model to assess its customer experience performance. The primary benefits include:

- Gain a clear understanding of the essential capabilities required to derive value from the CX program
- Leverage an established framework to create internal alignment around the design and execution of the CX program's strengths and weaknesses
- Develop a structured approach to identify your program's strengths and weaknesses
- Create plans for making progress towards organisational goals

The following link provides more information on the Qualtrics XM Maturity model:

[https://www.qualtrics.com/m/www.xminstitute.com/wp-content/uploads/2020/05/XMI\\_Assessment\\_CXMaturity.pdf](https://www.qualtrics.com/m/www.xminstitute.com/wp-content/uploads/2020/05/XMI_Assessment_CXMaturity.pdf)

To determine the Shire's current maturity score, a simple 6-question survey was asked of Shire staff in April 2023. The purpose of the survey was to gain an understanding of how the Shire staff perceive the organisation's level of CX maturity.

The results of the survey revealed that the Shire scored 13 out of a possible of 30, indicating that the current CX maturity level of the Shire of Augusta Margaret River is at the first of five stages; Stage 1 - 'Investigate'. This maturity level indicates that Shire leaders see the potential value in customer experience and have begun to explore how CX can help the Shire, including establishing CX activities.

A key goal of the Strategy is to increase the Shire's level of CX maturity from the Stage 1 to Stage 2 over the Strategy's 3-year timeframe.