DIGITAL RCT OUR DIGITAL STRATEGY

2022 - 2026







Digital RCT - OUR DIGITAL STRATEGY 2022 - 2026

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OUR DIGITAL JOURNEY - INTRODUCTION, CONTEXT

In 2017 we launched our first Digital Strategy. The strategy was underpinned by the key thematic areas of Resident, Workplace, Business, Visitor and Skills and achieved several positive outcomes of significance such as:

- Enhancing the availability of free Public WiFi in community settings making it easier for residents to get online and access information and digital services.
 Increasing the range of services available via our website which are available bi-lingually and 24/7 making it more convenient to access services and request support and resulting in a year on year increase in the percentage of interactions carried out online -85% (2017/18) to 93% (2020/21)
- Ensuring our schools have access to Digital Platforms to enable innovative and remote learning.
- Working in partnership to deliver Digital Inclusion initiatives like Digital Fridays which have led to improvements in the skills and confidence of participants using the internet.
- Joining-up of Data & Systems in some service areas across the Council and with partner organisations to enhance our approach to service planning and decision making and ensuring our services meet identified need.
- Safeguarding and appropriately managing our Customer information by ensuring compliance with the EU General Data Protection Regulations (GDPR).
- Deploying tools such as O365 to our workforce to support collaboration, automation, increased productivity and reduced manual and paper processes which improves the customer experience and reduces our costs.
- Enabling flexible and remote working, positively impacting on wellbeing and our carbon footprint.









Our initial strategy took us through to March 2020 and whilst the intention was to develop a new strategy for 2020-2024, the arrival of the Covid-19 pandemic meant that our focus was diverted to the immediate and critical priorities which the pandemic presented.

Our services and communities have faced unprecedented challenges during recent times, however the delivery of our 2017-2020 digital strategy meant that the Council was well placed to continue delivering key services and to also establish new digitally enabled services as part of the Council's response to the pandemic.

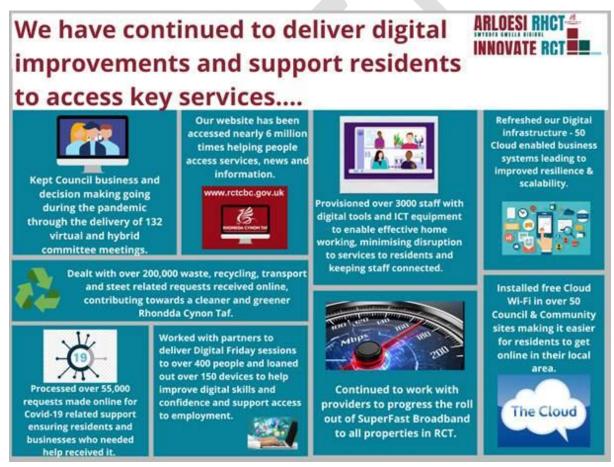
Working with our partners we supported the Cwm Taf Health Board with a digital solution to manage the vaccination programmes and to make the best use of the vaccines through request for short notice appointments. This meant as many of our residents as possible received their vaccines as the national priority group rollout continued.

Examples of digitalisation within the Council included putting in place a more joined up way for businesses to apply and provide evidence for Covid business grants. By putting the applications and the other grant requirements online in the same process, we were able to make quicker decisions and speedy payments to RCT businesses. We dealt with over 10,000 grant applications and paid out approximately £66 million pounds in grants.

As part of the Welsh Government's 'Hwb' digital Transformation Project, we made sure that every school was able to deliver the requirements for digital skills at the heart of the new curriculum through installing new IT systems. In addition, we worked closely with schools to provide over 5,500 laptops, tablets and Wi-Fi access to learners without home access during the pandemic.

The resultant change in the ways of working, greater collaboration and the adoption of new digital solutions ensured organisational continuity and the timely provision of crucial services to our communities. The reliance upon ICT & Digital Services has advanced to levels never seen before and throughout 2020/2021 we saw a remarkable and exceptional increase in the demand for digital services. This demand and dependency will only increase into the future.

The following illustration demonstrates further examples of digitalisation upto and including 2021.



In the context of the emerging "new normal" we have developed our 2022-2026 Digital Strategy which provides a framework that will enable us to build on our progress and further capitalise on the integral and transformational role that digital has played throughout the pandemic.

Our strategy reflects the ever-increasing role and reliance on digital in people's everyday lives and harnesses the transformative impact it has. It recognises that whilst demand continues to rise for online services, there are some who will continue to need

our help to access digital services supported through areas such as skills, devices or better connectivity. By providing this support we can open-up a new world of opportunities aligned to our Corporate Plan 2020-24 – Making a Difference that sets out our priorities that will help us to achieve our Council's vision. "To be the best place in Wales to live, work and play, where people and businesses are independent, healthy, and prosperous."

The Digital landscape in Wales has gained real momentum in recent times and our strategy aligns to the national vision for adopting a digital approach across Wales. The Digital Strategy for Wales was published in 2021 and we have seen the appointment of a Chief Digital Officer for Local Government and the launch of the Centre for Digital Public Services (CDPS) in Wales, who have in turn developed digital services standards and promoted a Government Digital Service (GDS) approach. All of which have positively influenced this strategy. We will aim to capitalise on all of these developments and collaborative opportunities, as well as maximising our strategic partnerships such as the Cardiff Capital Regional City Deal and Northern Valleys Economic plans.

This strategy embraces the direction set by the Well-being of Future Generations Act that sets out Wales's ambition for a prosperous, resilient, sustainable, healthier, more equal Wales, with cohesive communities, a vibrant culture and thriving Welsh language. These seven goals alongside applying the five sustainable development principles of long term, preventative, involvement, integration and collaboration provides us strategic direction for the development of digitally enabled services.

See Appendix A for examples of how our Digital Strategy will contribute to the seven well-being goals.

ABOUT THE DIGITAL STRATEGY 2022-2026

Our Digital Strategy 2022-2026 sets out what we are going to do over the next period to achieve our vision and maximise the benefits of digital for our **COMMUNITIES**, our **CUSTOMERS** (residents, businesses, staff, learners, elected members and visitors) and for us as a **COUNCIL**.

The strategy is also supported by a separate document outlining our digital ambitions for our Schools "Digital RCT – Our Digital Strategy for Schools."

A set of key principles will inform the way we work, and the delivery of our strategy will be underpinned by four thematic workstream areas:

- Digital Solutions and Service Design
- Data Insight and Intelligence
- Digital Infrastructure
- Digital Skills, Learning & Inclusion

A Digital Work Programme will be defined to cover each of these thematic workstreams, and an established Strategic Digital Delivery Board will play a key role in informing and influencing our policy and direction alongside challenging progress to ensure deliverables are met. The work programme will be defined over an initial 12–18-month term and then refreshed throughout the full term of this strategy.* This is in recognition of the significant pace of change in relation to the digital landscape and our ability to leverage future digital technology. The programme will be regularly revisited and revaluated to ensure that our deliverables continue to be the right ones to realise our goals and aspirations.

It is recognised that our work programme alone will not fully deliver our ambition and we will need to also align our technology, people, medium term financial and asset plans to maximise digital outcomes. Moving forward, our digitally enabled new ways of working will help us build greater resilience to better manage our future challenges.

In addition, cultural change will need to be at the forefront of our planning, and we must continue to harness the positive appetite seen during the pandemic to quickly adopt and embrace digital opportunities.

The strategy development has been informed by a wide range of stakeholders that has included elected members, citizens and officers.

*Note: Detailed digital work programme in development.

OUR VISION, STRATEGIC AIMS AND GUIDING PRINCIPLES

Our Digital Strategy will aim to better enable a more efficient and effective organisation, one that challenges everything we do to see if we can do it better and continually seeks to maximise the resources, we have available.

This strategy seeks to put in place our vision of being a truly "**Digitally Driven Council**" that provides excellent services which are resilient and secure and designed with the person and modern customer expectations at their heart, which are delivered by a digitally empowered workforce.

A set of overarching and guiding digital principles will be applied to our approach. These **PRINCIPLES** will underpin the delivery of our vision.

We will:

- Proactively seek to prioritise the digital improvements that deliver the most impact and benefit.
- Create an organisational culture allowing digital to thrive and encourage active challenge of the status quo.
- Undertake a "Council First" approach to digital delivery and services, further enable cross-service thinking and ensure we avoid duplication to maximise our digital outcomes.
- Develop creative digital solutions for business problems that meet clearly defined requirements and targeted measurable outcomes using appropriate project delivery frameworks and partners when required.
- Embrace digital technology and practices seeking to maximise potential as part of our organisational planning and trigger business process change.
- Seek to leverage our data insights and data intelligence to inform efficient decision making.
- Maximise our return on investment, using where possible our existing digital applications and utilising in-house digital skills.
- Support access to intuitive digital services, that are easy to use and leave noone behind.
- Collaborate wherever possible to openly share knowledge, good practice and solutions.
- Reduce our carbon footprint through the implementation of digital solutions, supporting our ambition to be carbon neutral by 2030.
- Deliver solutions optimised for accessibility, the Welsh language and to meet Welsh public sector design standards.
- Deliver compliant solutions in line with legislation, such as Local Government Elections Act and GDPR.
- Deploy and maintain scalable, robust, secure and cyber resilient high performing platforms.

DRIVING DIGITAL: OUR FOUR THEMATIC WORKSTREAMS

The following four thematic workstreams will enable us to deliver on our digital ambitions:

Digital Solutions and Service Design



Digital services will be designed to meet the needs of the customer. We will review and redesign our current processes as required, ensuring that service processes are "Driven by Digital" offerings, are customer informed, simplified and enables the evolving needs of our customers. Access to digital services is key to Council priorities and will promote independence, wellbeing, positively impact on economic growth and improve the digital experience.

Data Insight and Intelligence



We will strive to obtain the maximum value from our data, ensuring our decision making is informed from robust analysis and using data driven approaches to transform our Council services. Business Intelligence reporting dashboards will enable visualisations of information, optimised through the preparation of cleansed, aggregated and complex data sets, to perform advanced data analysis that better inform and influence outcomes as we bring together different views of our customers.

Digital Skills, Learning & Inclusion



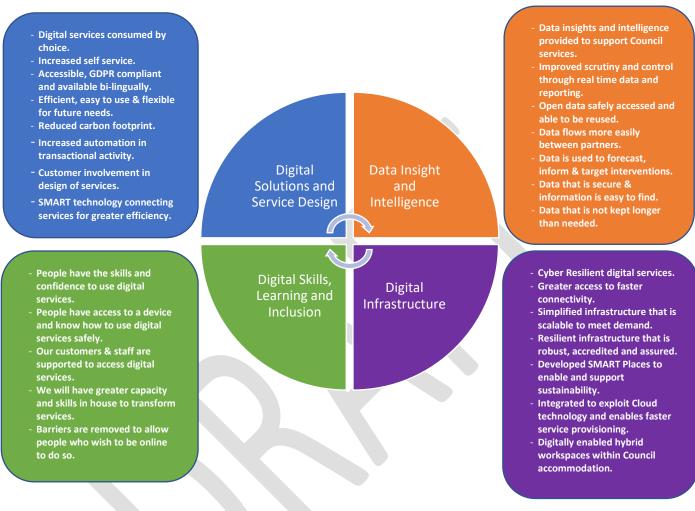
We will provide opportunities for people within our communities and organisation to develop their digital competency and confidence and provide access to assisted digital support, so that they are better equipped to access and use technology productively. We will support all to become more confident to safely use technology and effectively adopt new ways of doing things.

Digital Infrastructure



We will harness new and emerging technologies to underpin the redesign of public services in a way which meets the changing needs of services, staff and our communities. Digital Transformation can only be delivered if built upon modern, secure, resilient and scalable infrastructure and fast connectivity that enables end to end customer service and the needs of a modern mobile workforce.

We must deliver against all four of our enabling thematic workstreams as together they provide the collective which will enable our customers, communities and the council as an organisation to maximise the opportunities of digital. The following illustration and also Appendix B "A Day in the Life," articulates **thematic workstream outcomes** which will be realised through the delivery of our strategy.





Workstream 1: Digital Solutions and Service Design

By the end of 2026 we will have:

- Delivered more effective and efficient services that are designed 'end to end' and digitised, increased self-service, introduced greater automated workflow and reduced the administrative burden.
- All council services that are appropriate to be made available online, are available online; are accessible bilingually to all 24/7/365 and have better user experiences.
- Ensured that new council processes are enabled digital by default.
- Explored and deployed emergent technology such as Internet of Things (IOT), chatbots, robotic process automation and artificial intelligence where there is a benefit.
- Created a culture whereby the opportunities of service redesign & digital and adoption of new ways of working are embraced.
- Contributed to becoming a Carbon Neutral Council by 2030 by reducing the need to travel to access services, transact and by digitising paper processes.
- Ensure that new digital services are developed to be bilingual and fully accessible.
- Improved the user experience through online Self Service portals for Customers, Elected Members and Staff through the provision of an account and single point of access to transact with the Council, that in turn provides integrated access to all council related customer accounts e.g. Leisure, Libraries, Council Tax.
- Enabled greater community access to political process and decision making through e-democracy.
- Ensured Council accommodation can be managed more smartly, solutions integrated, and staff can seamlessly access facilities and easily book desks/collaborative work spaces.
- Provided assisted digital support to support anyone who may need help to use an online service...
- Continued to implement solutions across the Council to enable all officers & members to work effectively, efficiently, securely and safely irrespective of location (Home, Agile and Office).



Workstream 2: Data Insight and Intelligence

By the end of 2026 we will have:

- Leveraged relevant Council information to gain useful actionable insight from our rich data sources that better inform decisions.
- Enabled a common approach to council wide reporting, data dashboards and visualisations of data that are automatically updated and in near real time.
- Gained a holistic knowledge of the data needed to support the delivery of the various services provided by the Authority. This panoramic view offering

- significant opportunities to identify cross-cutting service and data themes for analysis and insight development.
- Drawn data from new sources such as SMART technology and Internet of Things (IOT) sensors to further inform strategic priorities such as independent living, decarbonisation, our environment including flood prevention.
- Built artificial intelligence and machine learning into business processes to create intelligent workflows to automate decisions.
- Become a data driven Council and used artificial intelligence and data science to our benefit.
- Focused our resources to prioritise and utilise insights, analytics and forecasting and move away from historic reporting. Challenged existing reporting outputs and refocus on what most matters.
- Created capacity and expertise in the effective use and management of data analytics to inform organisational priorities.
- Enabled greater information sharing and collaboration both internally and externally to the Council. Openly share and publish appropriate non-personal data, in accessible forms so that it may be re-used and create new opportunities.
- Established data standards to ensure a consistent organisational approach across the Council, that data is of a high quality and fidelity and ensured our insights are based on the most reliable data.
- Continued to ensure that data is secure and appropriately accessible.



Workstream 3: Digital Skills, Learning & Inclusion

By the end of 2026 we will have:

- Ensured people are more digitally confident and able to make the most of the opportunities that digital brings, should they choose a digital channel.
- Promoted a culture that fosters greater digital inclusion through learning & upskilling, continuing to engage with our residents to understand barriers and how we can best support them to be digitally included.
- Ensured learners have better access to devices in school settings and that the use of HWB and digital learning is increased.
- Provided our workforce with the opportunity to increase their digital skills and supported them to use technology to work more flexibly, effectively and efficiently.
- Provided customers with support to self-serve via an assisted digital approach, ensuring advisor support is available for people and more complex queries.
- Ensure digital skills, learning and inclusion activities are offered to meet demand through the medium of Welsh.
- Ensure that our Digital, Data and Technology staff are professionally developed to effectively support delivery.

- Fostered an approach of developing key frontline workers as digital champions to digitally assist citizens or signpost for further support.
- Worked collaboratively with County Borough partners to better coordinate and maximise our activities to overcome barriers to digital inclusion.
- Supported the delivery of a Digital Strategy for our Schools with the vision to provide: "Equality of Access and provision for all learners across the County Borough supporting excellence and high achievement in a creative, exciting and technologically rich environment, delivering success, valuing diversity, raising self-esteem and promoting lifelong learning skills and attitudes."
- Ensured our residents, have supported access to devices, should they need one; and we support their use of them.
- Developed greater awareness of how users can better protect themselves when accessing digital services and transacting online.



Workstream 4: Digital Infrastructure

By 2026 we will have:

- Managed the digital switchover with minimal impact on service delivery and maximised the associated benefits.
- Exploited infrastructure and technology driven solutions to create sustainable, more efficient Smart buildings and County Borough.
- Further improved our Cyber resilience and maintained required accreditation to ensure our data and assets are better protected from cyber threats.
- Developed a cultural awareness of Cyber Security to enhance the protection of our data and assets and ensure they are protected from cyber threats.
- Maximised the use of our existing tools and opportunities to build solutions before committing to buying new systems, software, applications etc. to deliver best value for money.
- Developed digitally enabled Council accommodation workspaces to better enable our hybrid workforce.
- Worked with strategic partners (e.g. Cardiff City Region, Northern Valleys Regeneration, BT Open Reach, Welsh Government) to increase access to faster broadband and light up current "not spots" areas throughout the County Borough.*
- Investigated the requirements and need for 5G connectivity and consider how this can be implemented in the Borough.
- Improved the resilience, availability and scalability of our Council & School digital infrastructure, where appropriate provisioning them through a cloud platform to provide greater assurance to its availability 24/7/365.
- Improved County Borough connectivity for residents & businesses, reduced 'not spots' and increased access to Full Fibre, Faster mobile broadband speeds.

*Note: as at February 2022, of 122,556 premises, 99.25% can achieve above 24mbps speeds, 98.76% above or equal to 30mbps and 22.41% can access Full Fibre (FTTP).

KEY MEASURES

THEME	PERFORMANCE MEASURES	
Digital Solution and Service Design	 % Digital Customer Interactions % Digital Business Interactions % Customer Digital Satisfaction Rate % services available digitally vs offline Number of key business processes / Services redesigned to provide "end to end" Digital Services % Staff ICT & Digital Service Satisfaction Rate 	
Infrastructure	 % Residents able to receive Superfast Broadband – reducing the "Not Spot" Areas. % Residents able to receive Full Fibre Broadband. % Tier1 ICT & Digital Systems/Services in the Cloud. % Availability of Tier1 ICT & Digital Systems/Services 	
Skills, Learning Inclusion	 % Increase of Staff/Members Digital Competency Device ratio for pupils Number of resident beneficiaries from loaned devices 	
Data & Analytics	- Number of service departments enabled with Business Intelligence Dashboards	

GOVERNANCE

With this ambitious and challenging strategy in place, new approaches to thinking will be needed and key decisions made to deliver service improvements and transformation.

To oversee the delivery of this Strategy and its associated Digital Work Programme, a Strategic Digital Delivery Board will be formed that is championed by the Cabinet Member for Corporate Services. The board will:-

- Provide the leadership and strategic direction to drive forward the Councils' Digital ambitions and priorities.
- Champion digital, technology and data across the Council, ensuring resources are deployed to achieve the maximum outcomes.
- Monitor and challenge progress of the Digital Work Programme to ensure deliverables are met.
- Act as a gateway for the strategic assessment and approval of future requested digital work proposals to ensure effective prioritisation.
- Oversee and guide the delivery of actions aligned to the strategy.

The Strategic Digital Delivery Board will ensure that progress reports against the Digital Work Programme will be provided to Scrutiny Committee, Cabinet and the Senior Leadership Team.

Examples of how our Digital Strategy contributes to the seven national Well-being goals.

Appendix I

National Well-being Goal	Aligned Principles	Key Actions
Prosperous Wales	 Proactively seek to prioritise the key digital improvement solutions that deliver the most impact and benefit. Maximise our return on investment, using where possible our existing digital applications and utilising in-house digital skills. Seek to leverage our data insights and data intelligence to inform quick and efficient decision making. 	 Increase access to faster broadband and light up current "not spots" areas throughout the County Borough. Improve skills through digital inclusion, guidance, upskilling and digital adoption schemes for residents and staff. A new Tourism website and digital bookings for events. Delivery of our Schools Digital Strategy.
Resilient Wales	 Create an organisational culture allowing digital to thrive and encourage active challenge of the status quo. Deploy and maintain scalable, robust, secure and cyber resilient high performing platforms. Seek to leverage our data insights and data intelligence to inform quick and efficient decision making. 	 Delivered more effective and efficient services that are designed 'end to end' and digitised whereby developing more resilient organisation. Investment in ICT & Digital Services. Exploring the use of new technology to better enable sustain delivery into the longer term.
Healthier Wales	 Reduce our carbon footprint through the implementation of digital solutions, supporting our ambition to be carbon neutral by 2030. Seek to leverage our data insights and data intelligence to inform quick and efficient decision making. 	 Leverage the use of accurate and timely joined up data to support our residents more effectively. Regional and national activities to better integrate Health & Social Care Digital Systems. Exploit Internet of things (IOT) technology to improve areas such as assistive living, air quality and travel to our town centres.
More Equal Wales	 Support access to intuitive digital services, that are easy to use and leave no-one behind. Openly share knowledge, good practise, and the sharing of solutions wherever possible. 	 Making sure that residents can access services, no matter what their background or circumstances. Solutions and services that are accessible. Schemes & Services for those residents who are digitally excluded. Providing opportunities to all our residents to improve their digital skills. Publishing Open Data so that it may be reused by all for benefit
Wales of Cohesive Communities	 Openly share knowledge, good practise, and the sharing of solutions wherever possible. Seek to leverage our data insights and data intelligence to inform quick and efficient decision making. 	 Designing services that are built around the customer and the community. Services that help people to live independently within their community.
A Wales of Vibrant Culture & Welsh Language	 Deliver solutions optimised for accessibility, the Welsh language and to meet design standards including the Centre for Digital Public Services (CDPS). 	 Deliver solutions and services that are designed bilingually. Seek to deliver solutions that meet business requirements and provide an option of Welsh language selection
Globally Responsible Wales	 Reduce our carbon footprint through the implementation of digital solutions, supporting our ambition to be carbon neutral by 2030. 	 Exploiting digital to better support decarbonisation, working in areas such as minimising need for staff journeys, optimise council fleet routes, reducing paper use, optimise datacentre efficiency, SMART buildings and more energy efficient technology. Exploit Internet of things (IOT) technology to improve monitoring of and impact to areas of environmental concern like flooding, air quality and volume of travel to our town centres.

Day in the Life as a Strategy Outcome

"A Day in the Life," examples that articulates thematic workstream outcomes and describes how digital solutions can improve lives.



Workstream 1: Digital Solutions and Service Design

Mrs Evans (Age 72, Widow, Lives at Home)

Mrs Evans is an independent elderly lady with a "low vision" impairment that lives on her own and has never previously accessed services or support online. However she has recently bought an iPad to help keep in touch with family and friends during the pandemic and now wants to be able to do use it to access services and transact from the comfort of her own home.

Having received support from Digital Friday events previously to connect her device to the internet (through the use of full fibre broadband that has recently been rolled out in her village). She decides to attend again to learn how to sign up for a customer account and access services on the council's website. During the Digital Friday session she is pleased to note that the website is designed in an accessible format, including features such as text resizing, meaning Mrs Evans can easily navigate around the site despite her low vision. She is supported to sign up for an account and in doing so she signs up to receive information which may be of interest to her.

One evening she receives a notification that the council's Adult Education team are starting a Pilates course and follows the link to book and pay for the course via her account. Mrs Evans likes the fact the course is also streamed online giving her the option of participating at home if she wants to.

After completing the course Mrs Evans feels healthier and fitter and is now considering using her local leisure centre. She uses the membership calculator on the council's website to input how many times a week she plans to visit the leisure centre and which activities she plans on undertaking. The calculator then provides her with information on which membership option provides her with the best value for money.

Mrs Evans' digital skills and confidence have improved significantly over recent months and she now accesses a range of online services safely, securely and independently, However she would like help completing her leisure membership registration online so accesses the live chat facility on the council's website where an advisor is able to take her through the sign up process using screen sharing tools.

As a Leisure4Life member she has the option of booking classes via her account and has the skills and confidence to do so. This gives her the flexibility to book at her convenience 24/7, wherever she is.

Mrs Evans now leads a much more active lifestyle and, when discussing the benefits of her new lifestyle to friends via video calls, has also supported some of them to sign up to courses and classes online.



Workstream 2: Data Insight and Intelligence

A Day in the Life - Officer Williams, Streetcare Manager

Officer Williams has recently been made responsible for cleaning up dog fouling issues throughout the County Borough. In order for her to understand where the issues are (reports of complaints), she accesses her data management dashboard that gives her a geographic view of where the worst hit areas currently exist. Through use of her management information system, she is able to allocate cases to her inspection officers whilst they are 'in the field', who are tasked with reviewing the worst affected areas in Pontypandy. The 'jobs' are accessed by the field officer through their staff mobile app, the location is pinpointed and displayed on a map through their mobile phone. Once the job is complete, the app allows the officer to send this information back to the Streetcare Manager, so she is able to quickly understand when the issues are resolved.

Through further interrogation of her analytics dashboards, Officer Williams believes there is an opportunity to optimise the locations of dog waste bins in Pontypandy Park. Officer Williams liaises with her Streetcare teams to revise locations.

By using data analytics to inform where the trouble areas are, and understand the reasons for the problems, Officer Williams was able to put a series of informed actions in place to eradicate the dog fouling issues in Pontypandy. Latest performance reports indicate dog fouling incidents have decreased by 70%.



Workstream 3: Digital Skills, Learning & Inclusion

A Day in the Life - Sophie, Student

Sophie is a fourteen-year-old pupil at a RCT Community School. She is studying biology as one of her GCSE subjects and would like to use her skills and knowledge with this subject for a job in the future. Historically she has had limited access to a laptop at home and uses her mobile phone for most of her research.

The school uses technology for supporting learning in some subjects but in the past sometimes resources have been limited. The school has benefited from the funding from the HWB Transformation Project. The funding has provided a significant number of additional laptops and tablet devices and improved WI-FI access throughout the school, including the outdoor learning areas.

Sophie really enjoys using the iPad to collect information out in the school environment and now that the school has outdoor WI-FI access, she can save her findings in her Office365 OneDrive for use later. When in class, Sophie can now access her data, findings and photographs on her Office365 OneDrive and is able to use this information quickly to complete her assignments.

Sophie feels that her use of digital allows her to enter the future jobs market with the skills relevant for the occupational opportunities she is seeking. Sophie uses the collaborative software everyday and has overcome a number of barriers with a digital approach to learning.



Workstream 4: Digital Infrastructure

A Day in the Life-Jim, Contact Centre Agent

Jim is a multi-skilled, multi-channel Customer Advisor in the Contact Centre. He no longer physically works in the contact centre all the time as the systems he requires access to are all cloud based and facilitate home working.

Jim logs in to the telephony platform and can see that this morning he is going to be dealing with live chats and social media queries. His first live chat of the day is a query that has been escalated from the council's chat bot. Jim can see that Customer A asked for and received information from the chat bot regarding their council tax balance and council tax discount. Jim can also see the customer was signposted to the online form for council tax discount but was unsure how to upload the required evidence which is why the chat bot escalated the chat to an Advisor.

Jim picks up the conversation via live chat without having to ask the customer to repeat any of the information already provided to the chat bot and provides some advice on the evidence the customer needs to provide. The customer is still unsure so Jim asks the customer to share their screen so Jim can check the evidence and successfully talks the customer through the upload process.

Before ending the call, Jim provides the customer with information about the customer portal and sends a link via text for the customer to complete the sign up process.

A week later, another advisor (Pam) receives a call from Customer A regarding their council tax reduction application. Via the CRM Pam can see the previous transactions Customer A has had with the chat bot and Jim regarding this guery and is able to guickly summarise the current status of the application. Customer A explains that their circumstances have changed and Pam advises the application therefore needs to be updated. As Customer A has signed up to the Customer Portal Pam explains that the quickest way to update their details is via the portal which provides seamless access to Customer A's Council Tax account.

Two days later, Jim is allocated a social media post from Customer A thanking the team for their support and advising that the discount has been applied. Jim knows exactly what the customer is referring to and provides the appropriate response.