

**CUSTOMER
SERVICE
EXCELLENCE**



Assessment Report
Customer Service Excellence

Devon Audit Partnership

Successful
7 December 2021

Assessment Summary

Overview

Overall Self-assessment	Satisfactory
Overall outcome	Successful

Remote RP1 2021 - In 2019 Devon Audit Partnership (DAP) celebrated ten years of the “not-for-profit” partnership. They continue to be an independent organisation that is both an ‘exceptional assurance provider’ and one that gives ‘added value’. DAP provides professional internal audit, counter fraud and assurance services including risk management, consultancy, governance, business improvement and cost containment, with the purpose to better the lives of people in the South-West through supporting clients to achieve their objectives effectively, and with minimal risk. DAP continues to be very strongly led from the top and the specialist team are all committed and dedicated to putting customers at the heart of what they do and being a ‘people organisation’. The Partnership lives up to its core values, drivers, mission and aims, all of which include putting the customer first and the CSE Standard remains a key driver for DAP’s customer focused development as it is used as a tool for continuous improvement. DAP responded to challenges of the pandemic through supporting front-line and back office-services and whilst there has been a turnover of some experienced staff, the culture of customer service remains embedded throughout. You have welcomed new staff, recognising that they can bring a fresh outlook and new ideas and you are currently looking at the new model for hybrid working (home and office based) in the future, recognising both the benefits and challenges that this will afford. This year’s remote RP visit demonstrated that delivering an excellent customer service remains a priority. It was discussed and agreed that there remains scope for additional evidence to support elements 1.3.5 and 4.2.4 to full compliance. You have retained the previous Compliance Plus (C+) ratings together with element 4.3.4 attracting a C+ rating. Elements 5.3.1 and 5.3.2 have now moved to full compliance. The assessor had no hesitation in recommending that DAP retain their CSE accreditation.

1: Customer Insight

Criterion 1 self-assessment	Satisfactory
Criterion 1 outcome	Successful

Remote RP1 2021- Criterion 1 is about customer insight and the importance of developing an in-depth understanding of customers. The Partnership continues to value customer insight and recognises that it is invaluable in looking to make service improvements and to support its core values, vision and aims, one of which is to provide added value for customers in addition to providing the best possible customer service. The DAP Strategic Plan 2021 – 2026 highlights that ‘customers are core to everything we do’ and to support this, you use a diverse range of means to gain real insight into how you can meet their needs and preferences. DAP has retained the previous C+ ratings in elements 1.2.3 and 1.3.2. and although you have undertaken a significant amount of work around customer journey mapping and now have a firm bedrock on which to build, there remains scope to show that you use journey mapping as a tool for looking at the customer’s emotional journey (1.3.5) before this element can be moved to full compliance.

2: The Culture of the Organisation

Criterion 2 self-assessment	Strong
Criterion 2 outcome	Successful

Remote RP1 2021 - Criterion 2 is about the culture of the organisation. It is evident that DAP is strongly led from the top, with a customer centric focus being promoted across the board. Despite a challenging year during the pandemic, DAP has been flexible in offering support to front-line and back-office services with view to responding to the crisis situation in your communities. Following a significant turnover of staff, you have welcomed new colleagues and recognised the value that their new ideas and fresh outlook can bring. At the same time you are ensuring that they will continue to promote and deliver your core values that include putting the customer first. You have retained all previous C+ ratings at 2.1.1, 2.1.5, 2.1.6 and 2.2.4 and you demonstrate a strong performance in this Criterion with no areas of partial compliance.

3: Information and Access

Criterion 3 self-assessment	Satisfactory
Criterion 3 outcome	Successful

Remote RP1 2021 - Criterion 3 is about Information, Access and Partnership working. High quality accurate information is a priority for DAP and you make this available for all customers, ensuring that services are easily accessible for all clients and potential customers. It is noted that your website is provided via Devon CC and that it must comply with their expected format and criteria, however you keep it under review in order to maintain relevant updates and improvements. You have maximised the use of electronic media to provide information through this alternative format during the challenges of Covid 19 and minutes of the DAP Committee meetings are online. Compliance in this area remains strong and you have maintained the C+ ratings at 3.2.1, 3.2.3 & 3.4.2, with no areas of partial compliance.

4: Delivery

Criterion 4 self-assessment	Satisfactory
Criterion 4 outcome	Successful

Remote RP1 2021 - Criterion 4 is about Service Delivery. DAP ensures that that services meet the standards as set out by the Institute of Internal Auditors and the Public Sector Internal Audit Standards and you closely measure performance against main business KPI's and Local Performance Indicators, reporting to the Partnership Board and the Partnership Committees. Whilst DAP recognises the value of benchmarking, there is scope to develop this practice further and demonstrate that you have not only learned from any identified best practice, but that you publish examples externally, where appropriate. As such element 4.2.4 remains partially compliant. You demonstrate a flexible approach towards meeting individual needs. DAP is more than willing to listen to customers and to act on any feedback with a view to improving services, for example, any feedback where customers rate the service as 'poor', is treated as a complaint and where relevant you have taken resultant actions, including providing additional staff training. Element 4.3.4 merits a C+ rating.

5: Timeliness and Quality of Service

Criterion 5 self-assessment	Satisfactory
Criterion 5 outcome	Successful

Remote RP1 2021 - Criterion 5 is about Customer Service and it draws on what customers have identified as being the most important factors in delivering excellent customer service. It focuses on customer service standards for timeliness and quality of customer service. You monitor performance against a variety of service delivery areas including KPI's and there is no doubt that putting customers first is at the heart of everything you do, including delivering an excellent added value customer service that is a priority. In light of the nature of your organisation and the close 1-2-1 working with customers, it is considered that elements 5.3.1 and 5.3.2 can be moved to full compliance as you use the most relevant means to establish that you are meeting your standards for timeliness and quality of customer service. However, it was discussed and agreed that whilst evidence is accepted as sufficient for compliance at this visit, it would be beneficial to explore whether there is scope to strengthen it even further. Criterion 5 is now fully compliant.