

Section 6 Customer Services

Ref No	Title of Document [local name]	Retention Period	Current format	Authority	Notes/Access	P/M
6	Customer Relations Team					
6.0.1.	Comments & Compliments	2 years from last active contact	paper and electronic – reports, esuite forms, correspondence, feedback database records	Best Practice	Good business practice, could become a complaint Retain: anonymised copies for statistical data on volume and type for 10 years	P/M
6.0.2	Complaint records: stage 1, stage 2 and LGO	3yrs from date complaint closed*	paper and electronic – reports, esuite forms, correspondence, feedback database records	Best Practice	<p>*From date of final report issued/final piece of correspondence response sent to complainant/LGO.</p> <p>Retain: anonymised copies of complaints of particular interest. Anonymised data retained for 10 years for statistical purposes.</p> <p>Exceptions:</p> <ol style="list-style-type: none"> 1. repeat complaint within 12 months and previous complaint is relevant to more recent complaint 2. subject to legal action 3. Ongoing FOI/DP/EIR complaint with ICO 4. Complex complaint/challenging behaviour – reasonable discretion can be used to retain longer by agreement with CRM 5. This schedule does not relate to complaints managed under statutory complaints procedures for Childrens and Adults. 6. Complaints relating to children who have been assessed by Childrens Social Services must legally be retained for 75 years. 	P/M

KEY: M = Management documentation, P= Prime document, SHC = review samples for Surrey History Centre

6.0.3	Unreasonable behaviour correspondence where formal notification given of decision to manage contact	12 months from date issued. 12 months from date of review	Paper and electronic correspondence	Best practice	This schedule does not relate to notifications related to Childrens and Adults social care issues where different retention periods may apply Exception: Where a customer is exhibiting a pattern of repeated behaviour and/or has ongoing complaints, information requests etc. Discretion applied to retain longer with agreement of the Customer Relations Manager Unreasonable behaviour in connection with complaints reverts to the complaint retention guidance (6.0.2 above)	P/M
6.0.4	Guidance & standards for external use	Until superceded +2 yrs	none specified	Good Practice/Audit	Relates to any standards/guidance externally published with regard to complaints procedure,process, handling and guidance. Policy on complaints from the public is also an integral part of the Code of Corporate Governance which is covered by a separate retention policy.	M, SHC
6.1	Generic Contact Centre					
6.1.1	Customer Relationship Management Database (CRM)	5 yrs (from last active contact)	Zendesk	Good Practice	Good business practice, insight and data analysis to improve services.	M
6.1.2	Call recordings	62 days, except where used as part of complaint investigation, (please see complaint retention details above) or where necessary to retain for performance monitoring and training needs (CY+1)	BT Verint	Good Practice	Training , performance management and compliance purposes and for complaint investigation & service improvement	M

6.2	ASC Contact Centre					
6.2.1	Customer Relationship Management Database (CRM)	5yrs (from last active contact)	Zendesk	Good Practice	Good business practice, insight and data analysis to improve services. Personal details are only taken where a request is made for hard copy information to be posted, all other enquiries are anonymised .	M
6.2.2	Call recordings	62 days, except where used as part of complaint investigation, (please see complaint retention details above) or where necessary to retain for performance monitoring and training needs (CY+1)	BT Verint	Good Practice	Training, performance management and compliance purposes and for complaint investigation & service improvement	M
6.2.3	Correspondence received from internal services or external partner organisations for action by ASC CC	Data entered on Liquid Logic falls under ASC retention policies, email CY+2yrs	email, Liquid Logic	Corporate/Good Practice		P/M
6.2.4	One Stop Surrey	Data entered on Liquid Logic falls under ASC retention policies, email, esuite forms and paper applications CY+2yrs	email, esuite forms, paper applications, Liquid Logic	Corporate/Good Practice		P/M
6.3	Blue Badge Team					
6.3.1	Blue Badge applications for disabled residents	data entered in BBIS DfT system follows DfT current retention policy (CY+6)**, paper applications: CY +1 (after which confidentially destroyed), emails to BB team: CY + 1 **once new system in place CY+6	BBIS, paper applications, emails	Good Practice and DfT defined retention for BBIS		M
6.4	Web & Digital Services					

6.4.1	Website and intranet analytics collect IP addresses of visitors to the website/intranet	Analytics data is retained indefinitely by each third party service, to provide historical information about website usage. Data will be deleted in the event that the contractual agreement with the third party is ceased.	Google Analytics, Siteimprove Analytics and Cludo search on behalf of Web & Digital Services	Good Practice	To gather data on how often residents visit the website, what device they use to access the website, how they accessed the website (direct, referred or search engine) and their customer behaviour once they are on the website. All used to inform improvements to the content and structure of the public website, partner websites and S-Net Core.	M
6.5	Contact Centre Admin Hub					
6.5.1	General post correspondence	CY + 4 yrs where scanned on to CRM (see 6.1.1.) post log CY+1yr, paper copies 12 weeks	email/post	Good Practice	Good business practice/audit trail of received post. No correspondence containing financial or sensitive data is scanned onto CRM. Post log contains only basic details required to identify letters if receipt is queried by resident.	M