Agenda Item 8

Name of Project: Customer Services **Project Sponsor:** Andrew Grant (AVDC)

Project Manager: Lesley Yates (AVDC)

1. Recommendation

1.1. That the Joint Improvement Board:
a) Notes the progress of the Project to date,
b) Approves the Vision Statement for the Customer Services Project

2. Project vision/objectives

The Vision

2.1 In order to develop the Vision, the Customer Services Project Board commissioned a facilitator from Vertex Business Solutions to undertake a visioning workshop. Following this workshop the Project Board have agreed the text for the proposed vision statement for the Customer Services Project:

One Touch

We will create an integrated, seamless and effective customer experience that improves the lives of our customers, partners and staff.

2.2 The Project Board are currently evaluating what principles are needed to underpin the partnership vision. The five themes that have been identified so far are:

- Customised/Individual Service Delivery – understanding the needs and expectations of customers to drive forward service improvement. Recognising the diversity of our customers and promoting equalities throughout our service.
- Common Customer Information – developing a single customer view. Linking up information on customers and properties to gain an understanding of the whole customer. Accessing services across the County. Consistent and integrated policies and standards.
- Consistent Service Delivery – emphasising outcomes that are achieved by joining up services, across the five councils and with external service providers, in line with customers' real-life needs. Integrated policies and procedures. Integrating services seamlessly by consolidating customer-facing and back-office functions and looking at end-to-end processes to allow service integration and process re-design. The customer will detect

no difference in quality between the parts of the end-to-end services wherever and however they are delivered.

- Channel Management – Enabling customers to contact the councils 24 hours a day, 7 days a week, through a variety of access channels. Utilising technology to "bundle" services in ways that suit customer needs and not organisational structures and boundaries.
- Culture and Change – Developing the "One Touch" Customer Service philosophy in everything we do. Consistency of training and development. Harmonisation of staff.

2.3 The vision and principles are presented diagrammatically in Appendix 1.

2.4 The Joint Improvement Board are requested to approve the vision statement given in paragraph 2.1.

2.5 The Project Board will continue to work on developing the objectives and principles and a further briefing will be given at the JIB December meeting.

3. **Summary Progress and key highlight report**

3.1 The Project Board for the Customer Services work stream has been meeting at fortnightly to monthly intervals and completed the research phase of the work plan, together with significant progress on the Vision. Progress to date is as follows:

- The Joint Improvement Board approved the initial objectives and scope of the Customer Services Project at their meeting of 14th September 2007.

- Familiarisation – The Project Board have visited all five Buckinghamshire councils' customer facilities and shared customer and transactional information.

- "Where are we now?" – The BCC Change Support Team were commissioned by the Project Board to undertake research and undertake a "High Level Report" analysing customer demand and customer metrics across Buckinghamshire. The report highlighted areas of commonality, principles of good practice, identified gaps and made general observations and recommendations on some priorities for improvement.

- "Learning from Others" – a Board officer has researched a range of strategies from councils across the country (Customer Services, Customer Contact and Access Channel Strategies). A summary report has been produced identifying common initiatives, areas of best practice and examples for further follow-up.

- Visioning Workshop – on 5th October 2007 a visioning workshop was held, facilitated by Jo Daly from Vertex Business Solutions, to develop the Customer Services vision, aims and objectives. The workshop concluded by starting to outline a high level Roadmap for Customer Services in Buckinghamshire. The output from the workshop began the process of

providing a strategic framework for the development of Customer Services for our partnership, as well as the basis for leadership messages to be given to staff working in, or interfacing with, the processes, systems and organisational design for Customer Services. The output will also be used to inform subsequent business cases, benefits realisation and post-implementation reviews, and provide the basis for consistent communication to all stakeholders.

- Second Visioning Workshop – on 23rd November 2007 a second stage workshop was held in order to continue developing the objectives and principles underpinning the Customer Services vision and translating these into the "what" and "how" of the project. The outputs from the day completed the work on the objectives and principles, produced a Roadmap, an action plan and a "next 100 days" action list. The final version of the "Vision and Objectives Document" for the business case is currently being agreed by the Project Board.

3.2 **Next Steps**

- Programme of Visits – follow-up to the "Learning from Others" work to understand what can be learned from leaders in the field and define where we can add value as a Pathfinder in Buckinghamshire.

- Analysis Phase – detailed work bringing together the findings, information and reports from the research phase of the project to enable the Project Board to deliver the vision and objectives. This will include a gap analysis and identifying the initial set of projects and "quick wins". The Board will also look at the wider 5 year implementation plan. An external resource will be commissioned to support the Board through this phase.

- Planning Phase – Once the above has been completed, the Project Board will develop a route plan with options and efficiency costings and savings for consideration by the Joint Improvement Board in April 2008. The plan will also identify the resources required for a Project Team to take the plan forward. An external resource will be commissioned, particularly to assist the Board through an options appraisal process and to accurately identify efficiency costs and savings.

3.3 Timescales and key milestones

Please see Appendix II

4. Within Project

Key activities and milestones to inform reporting to JIB/Leaders group – are we on schedule to achieve our key milestones, if not provide an explanation of why and what action has been taken.

4.1 Outside Project

FOSS and Varney reports. Project Board Members attending seminars and keeping a watching brief.

5. Deliverables/quick wins

The project board is currently working on identifying quick wins.

6. Financial update

Capacity Building Funding Bid – the bid to the South East Regional Improvement and Efficiency Board included a submission for funding to augment the Customer Services Project Board's capacity to develop a costed business case and options appraisal. Approval for the bid has been confirmed with £74,700 identified for commissioning resources for the analysis and planning phases of the Customer Services Project. Current spending is aligned to this budget.

7. Member involvement

Project Board members are tasked with regularly updating their own portfolio holders and this is happening.

8. Related projects / Work streams

Continuous communication with internal transformation boards and between active pathfinder projects.

9. Communications plan

Project Board Minutes distributed to all partners and copied to programme management.

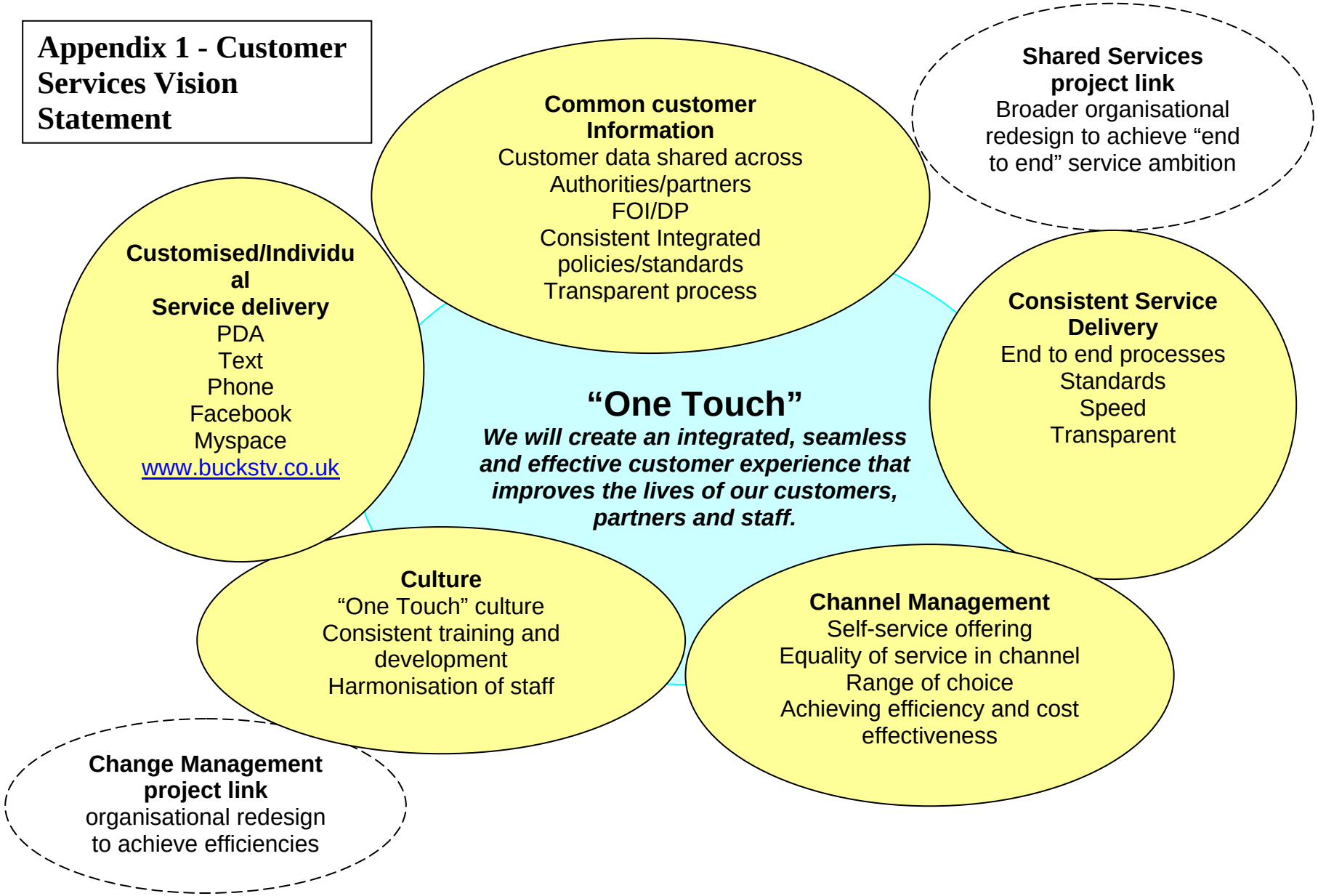
Regular project highlight reports produced by the project manager and distributed to partners, internal transformation boards, programme management and portfolio holder.

10. Key Risks and Issues

Risk Register – the Project Board has identified the risks associated with the project and regularly reviews and maintains the register.

Issues, Opportunities and Change Registers – these registers capture issues and opportunities as identified by the Project Board through the course of its work. The Change Register records agreed alterations and influences throughout the Project's history.

Appendix 1 - Customer Services Vision Statement



Appendix 2 – Timescales and Key Milestones

Task	Sub-Task	Estimated Duration	Start	End	Status
Project Controls		31d	Fri 18/05/07	Fri 29/06/07	**Complete**
	Work with Sponsor/Project Board to develop clear Vision, identify risks and critical success factors	5d	Fri 25/05/07	Thu 31/05/07	**Complete**
	Create Project Briefs for Working Parties	5d	Fri 25/05/07	Thu 31/05/07	**Complete**
	Identify Project Team/resource	3d	Tue 29/05/07	Thu 31/05/07	**Complete**
	Create and maintain a communications plan	1d	Thu 31/05/07	Thu 31/05/07	**Complete**
	Create and manage "Risks, issues and change logs"	10d	Fri 18/05/07	Thu 31/05/07	**Complete**
	Develop and initiate Team activities	10d	Fri 18/05/07	Thu 31/05/07	**Complete**
	Develop project proposal for the project (this activity must include risk workshop, business case, etc)	5d	Mon 11/06/07	Fri 15/06/07	**Complete**
	Create initial Project Plan	5d	Mon 25/06/07	Fri 29/06/07	**Complete**
	Develop proposal/PDD	3d	Wed 27/06/07	Fri 29/06/07	**Complete**
	Identify cost/benefits of project	3d	Wed 27/06/07	Fri 29/06/07	**Complete**
	Recommend and obtain budget for initial project phase and resources	5d	Mon 25/06/07	Fri 29/06/07	**Complete**
	Prepare 'skeleton' Project Definition Document (PDD)	4d	Tue 26/06/07	Fri 29/06/07	**Complete**
Gain approval for project proposal from JIB		0d	Fri 27/07/07	Fri 27/07/07	**Completed 14/09/07**
Start-up Phase		46d	Fri 25/05/07	Fri 27/07/07	**Complete**
	Project team to identify initial resources required, both internal and external	3d	Tue 29/05/07	Thu 31/05/07	**Complete**
	Programme regular meetings of project team	2d	Wed 30/05/07	Thu 31/05/07	**Complete**
	Project Team familiarisation (visits to each centre/workshop)	40d	Mon 04/06/07	Fri 27/07/07	**Complete**
	Each council to identify their representative for the project team	5d	Fri 25/05/07	Thu 31/05/07	**Complete**
Vision Phase 1 - Clarify		10d	Wed 06/06/07	Tue 19/06/07	**Complete**

approach					
Risk Identification		13d	Wed 06/06/07	Fri 22/06/07	**Complete**
Research Phase		125d	Wed 06/06/07	Tues 2711/07	**Complete**
	Customer Demand Research	20d	Wed 06/06/07	Tue 03/07/07	**Complete**
	Customer Metrics Research	20d	Thu 19/07/07	Wed 15/08/07	**Complete**
	'Learning from Others' Research	20d	Thu 19/07/07	Wed 15/08/07	**1st stage complete**
	Customer Survey	20d	Wed 31/10/07	Tues 27/11/07	**On Hold**
Vision Phase 2		41 days	Fri 05/10/07	Fri 30/11/07	**Complete**
	Develop Vision Statement and Start Objectives/Roadmap (external facilitator) – Workshop 1	26d	Fri 05/10/07	Fri 09/10/07	**Complete**
	Finalise and agree Vision Statement and develop Objectives and Roadmap (Workshop 2)	10d	Mon 12/11/07	Fri 23/11/07	**Complete**
	Finalise Vision Document	20d	Mon 05/10/07	Fri 30/11/07	**With Project Board**
Learning from Others Stage 2		26d	Mon 26/11/07	Mon 31/12/07	
	Site visits to other projects/initiatives	26d	Mon 26/11/07	Mon 31/12/07	
Analysis and Planning Phases		80d	Mon 03/12/07	Fri 21/03/08	
	Commission and obtain Gap analysis, other analyses and options appraisal to include estimated benefits	45d	Mon 3/12/07	Fri 01/02/08	
	Plan phased approach/combine analysis/vision and create plan/identify “quick wins”	20d	Mon 04/02/08	Fri 29/02/08	
	Finalise JIB Report	15d	Mon 03/03/08	Fri 21/03/08	
JIB approval to proceed		0d	Tues 01/04/08	Tues 01/04/08	
Form Implementation Project Board and “Hand Over”		10d	Tues 01/04/08	Mon 14/04/08	
Implementation Phase		?	Tues 15/04/08	Onwards	