SUBJECT:	*Customer Experience Programme*
REPORT OF:	*Customer Services–Cllr Duncan Smith SBDC, Cllr Fred Wilson CDC*
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WARD/S AFFECTED	*All*

1. Purpose of Report

To provide a brief progress report on the Customer Experience Programme and the plans to implement the aims of the strategy – to put the customer at the centre of what we do, in line with our 'Stronger in Partnership' strategy.

> **RECOMMENDATION:**
>
> **The Committee is invited to note the progress made to date.**

2. **Background**

2.1 Members will be aware that the Full Business Case for the Customer Experience Programme was approved at Joint Committee on the 28th June 2018. This included the procurement of a technology partner.

2.2 Work has now commenced on implementing the aims of the programme, with the development of an implementation and support team, as approved by the Joint Staffing Committee on the 18th July 2018.

3. The Full Business Case

The Full Business Case was approved on the 28th June 2018. It verified that moving to the Target Operating Model (TOM) of centralised contact into Customer Services developed as part of the Outline Business Case, and carrying out the associated programme of transformation, will deliver the anticipated benefits (both financial and non-financial) and improve our customers' experience.

The proposed TOM will be supported by a new organisational structure creating opportunities for staff from the service area administration support units to transfer to the Contact Centre. This will be underpinned by new technology and processes to ensure greater efficiencies and financial savings, offering a significant improvement of our digital offering and building a data rich Contact Centre that enables us to analyse our customers' needs and shape our services accordingly.

We aim to provide a more consistent experience where customers receive the same level of service regardless of the service, individual, or channel used. We want to ensure customer queries are resolved at the first point of contact whenever possible and minimise the hand-offs to other teams.

We also want to ensure Customer Services staff have the information and knowledge required to provide a quality service aiming for 'right first time'.

To increase the digital offering, we must ensure that the customer can interact online with the Council via self-service channels with no degradation to the service received. We will also ensure the Councils use data and customer insight to continually review and inform the development of the service on an evidential basis.

The following activities and assets were delivered as part of the Full Business Case:

- Value Chains – a review of the common ways of working across service areas
- Service catalogues – a list of service requests that involve service delivery
- Requirements – for each service area a detailed set of requirements showed the scope of the forms used, any integrations, status updates and triggers back to the customer
- Functional Analysis Report – this was conducted within the service areas, identifying any group activities undertaken. This was to inform the percentage of activity that could be transferred to Customer Services
- Procurement – engaging with the market to seek a technology partner.

4. Costs and Benefits

The savings expected from centralisation, increased efficiency, and channel shift, are projected to be **£500k** per annum by 2022/2023, the fourth year of the project. Savings will be realised on an incremental level over those five years and will be reflected in the budgets for 19/20 onwards, as channel shift becomes more effective. Once the capital and revenue investment into the service has been taken into account, the business case will be cash positive in year 2, pay back in year 3, and yield over £1 million pound in net savings over 5 years.

The implementation costs of the programme come to £700k over the first two years. This includes the staffing costs for the implementation team, and the associated costs with our technology partners.

As highlighted in the Full Business Case, the transformation savings target is £310k. As we achieve channel shift, and greater efficiencies through integrations, the effort in the service areas will decrease. Therefore, Management Team has set a transformation target for each of the service areas, which equates to 3.75% of the salary budget for the service areas. These targets will be revisited and adjusted if actual data contradicts this analysis.

We have also predicted savings that can be achieved through channel shift, directing customers to self-serve on our digital platforms rather than use telephony or face-to-face.

We have used a model that aims for a 75% channel shift over five years, from the commencement of the first phase in May 2019. The ultimate aim is for an 80/20 channel shift, which would realise greater savings.

The predicted savings through channel shift are £490k.

Therefore, the total estimated benefits per annum are £800k. We have developed a benefit tracker, to help us monitor these benefits and ensure the programme is delivering as predicted.

5. Technology partner

The project team procured a technology partner through G-Cloud Framework Digital marketplace. The aim was to find a supplier who could develop to our requirements - a CRM Lite, interactive forms, an integration engine, push notifications and a customer account. We have now completed the call off contract with GOSS Interactive, who have begun development of these assets.

The cost of the contract with GOSS, over four years, totals £426,976. We have included the cost of the existing GOSS CMS as part of the solution, therefore saving £4,814 per annum on our current CMS contract.

The costs are broken down into implementation costs of £179,956, with an annual licence fee of £79,360. The licence fee for the first year is reduced to £8,940, based on a calculated project Go Live data of May 2019.

6. Implementation Team

To work on the programme an implementation team has been appointed. The Implementation and Support team is situated within Customer Services, reporting to Yvonne Hadlames, the Customer Services Manager, and to Nicola Ellis, Head of Service for Customer Services.

This team of six people is made up of the following roles:
- Implementation and Support Manager
- Web Channel Management Analyst
- Customer Insight Analyst
- System Analyst
- Customer Services Training Officer
- Support Officer

These members of staff are beginning the process of engaging with service areas and with GOSS Interactive, in the development of our digital offerings and the aims of the programme.

7. Approach

The programme will be dealt with in a measured, phased approach over two years, with three phases of transformation. The first phase, which we are commencing now, includes the following service areas:

- Licensing
- Waste
- Environmental Health.

This phase is due for completion in May 2019. All service areas with significant public contact will be looked at by October 2019.

A detailed project plan for the programme has been drawn up, which highlight the individual projects that make up the programme. The high-level plan is as follows:

The above shows the high level plan for the phases with the service areas.

The next diagram shows the high level plan for the Customer Experience Programme, showing the associated projects that form the strategy.

Y: 2017 | 2018 | 2019
M: Oct Nov Dec | Jan Feb Mar Apr May Jun July Aug Sep Oct Nov Dec | Jan Feb Mar Apr May Jun Jul Aug Sep Oct

Restructure
- Define Approach (Jun–July)
- Analysis and Prepare Consultation (Jun–Aug)
- Consultation (Sep–Oct)
- Appointments and Initial Transfer (Jan–Apr)
- Dependent upon approach agreed in June / July 18
- Continue transfer as services are phased into Customer Services (May–Oct)

Website – Content Refresh
- Define Approach (Jun–July)
- Phase 1 Services – Content Refresh (Aug–Sep)
- Phase 2 Services – Content Refresh (Nov–Dec)
- Phase 3 Services – Content Refresh (Feb–Mar)

Channel Shift Promotion
- Define Approach (Jun–July)
- Promote current offering (Aug–Mar)
- Promote new offering (Jun–Sep)
- Update electronic and published print removing direct e-mail and direct dials (Aug–Oct)
- This may need to be phased over a longer time period for some services - this will be defined in June / July 18

Complaints Management
- Review Process (Aug–Sep)
- Implement and Embed Changes (Oct–Dec)

Performance Management
- Develop Method (Jun–July)
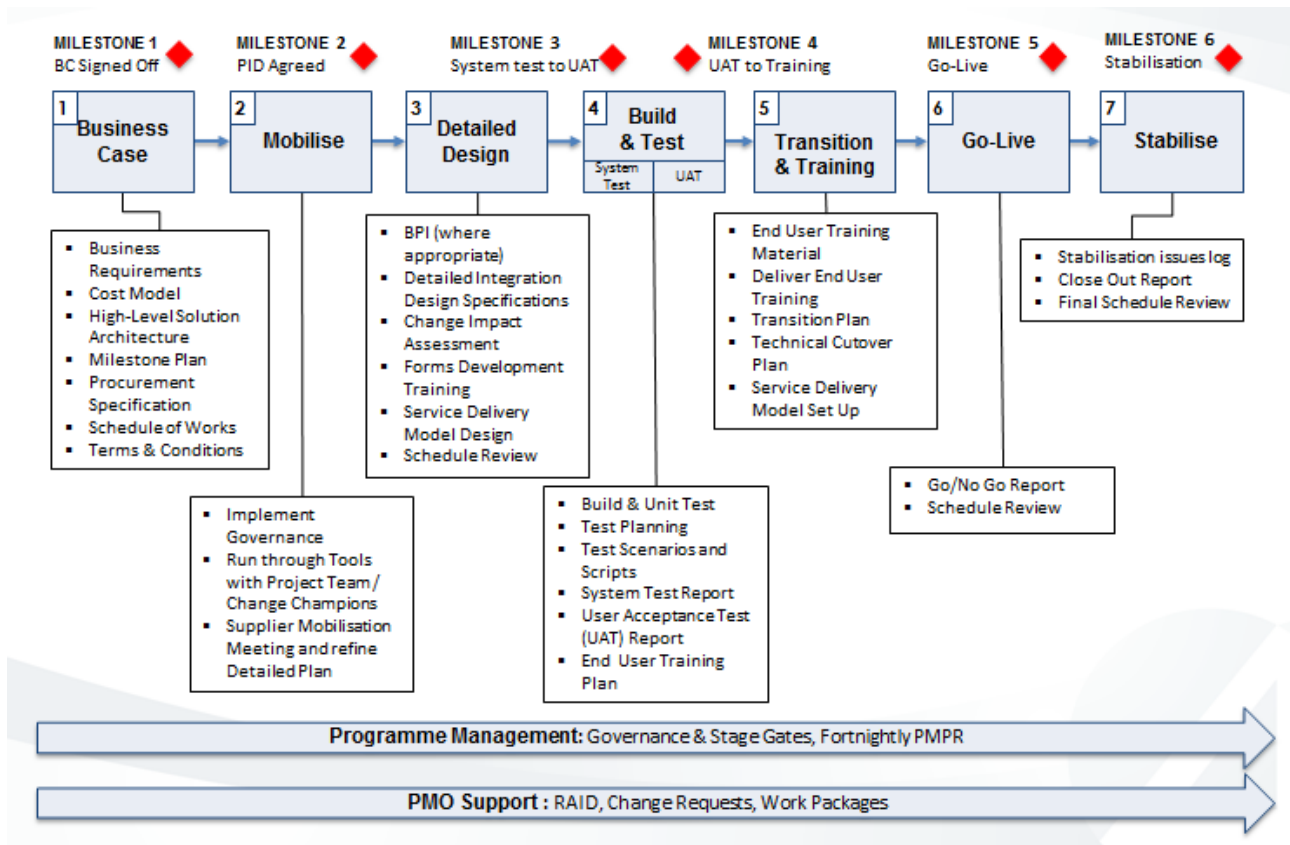- Develop SLAs and OLAs (Aug–Dec)
- Develop Performance Framework and supporting tools (Oct–Dec)
- Pilot and Refine (Jan–Mar)
- Phased Implementation as Services Go-Live (Apr–Aug)
- Full Launch (Apr–Jun)

Telephony
- Train Super Users (Oct–Nov)
- Develop Telephony Reports and Capability (Dec–Feb)

The next graphic gives context on the Project Delivery Process, an overview of our approach:

MILESTONE 1 BC Signed Off
MILESTONE 2 PID Agreed
MILESTONE 3 System test to UAT
MILESTONE 4 UAT to Training
MILESTONE 5 Go-Live
MILESTONE 6 Stabilisation

1 Business Case	2 Mobilise	3 Detailed Design	4 Build & Test (System Test / UAT)	5 Transition & Training	6 Go-Live	7 Stabilise

1 Business Case
- Business Requirements
- Cost Model
- High-Level Solution Architecture
- Milestone Plan
- Procurement Specification
- Schedule of Works
- Terms & Conditions

2 Mobilise
- Implement Governance
- Run through Tools with Project Team / Change Champions
- Supplier Mobilisation Meeting and refine Detailed Plan

3 Detailed Design
- BPI (where appropriate)
- Detailed Integration Design Specifications
- Change Impact Assessment
- Forms Development Training
- Service Delivery Model Design
- Schedule Review

4 Build & Test
- Build & Unit Test
- Test Planning
- Test Scenarios and Scripts
- System Test Report
- User Acceptance Test (UAT) Report
- End User Training Plan

5 Transition & Training
- End User Training Material
- Deliver End User Training
- Transition Plan
- Technical Cutover Plan
- Service Delivery Model Set Up

6 Go-Live
- Go/No Go Report
- Schedule Review

7 Stabilise
- Stabilisation issues log
- Close Out Report
- Final Schedule Review

Programme Management: Governance & Stage Gates, Fortnightly PMPR

PMO Support : RAID, Change Requests, Work Packages

The mobilisation phase involves mobilising the following;

- Suppliers – we have held a mobilisation meeting with GOSS Interactive on the 7th August
- Change Champions – these are the service area specialists who are involved in the programme. The project team met with the whole group on the 21st September and with those involved in phase 1 on the 25th September
- Sharing documentation with suppliers – we are in a dialogue with Agile Applications, the supplier of the Contender software used by the Waste Department, to discuss integrations and how best to transfer information from customer to service area, and back the other way
- We will also be refining the plan during mobilisation

As we move into design and build, we will commence training on form development, process and content design, and working closely with the technology providers on integrations. We need to ensure we review the current forms to make sure our communication with the customer is as accurate as possible, capturing the information we need to manage the service requests at first point of contact.

We will be working closely with the service areas involved in the first phase of the programme. We will be holding workshops to conduct the following activities:

- Workshop 1: Initial analysis and design of processes and forms
- Workshop 2 and 3: Review the forms, process and content
- Workshop 4/5: Validate and sign off the form designs

To assist this work we have developed a design checklist and a form tracker, to enable services to see the progression of the development work.

8. Outside Consultancy

We will continue to use 4OC in a consultancy role, using their expertise to bring value to the programme and to assist in our approach.

9. Communications

After the decision was made on the Full Business Case staff engagement sessions were held, with any questions and relevant answers posted on the intranet. We also continue to provide staff updates through newsletters. We are engaging with service areas, holding workshops to make sure we capture the right information. GOSS Interactive also have plans to host engagement sessions, to showcase their products and to highlight the value they will bring.

We will continue to update the Members' Working Group on the progress of the programme.

GOSS are developing sessions where Members will be able to meet with them and discuss the technology solutions, capturing more information on the approach and what GOSS can bring to the programme.

10. Next Steps

The following activities form the next steps for the programme:

- Staff training with the implementation team – we also have a team planning day booked to build cohesion within the team and to ensure everyone is aware of the aims of the programme
- Mobilise the build of the CRM system with GOSS Interactive
- Mobilise the phase 1 service areas – Waste, Licensing and Environmental Health – the section above headed 'Approach' gives more detail on this activity
- Engage with those service areas to develop the design of the customer interactions
- Commence building these customer interactions within the GOSS Interactive platform

Background Papers:	None other than referred to in this report