

## Committee: Overview and Scrutiny Commission

**Date: 5 April 2016**

Agenda item: Customer Contact Programme Update

Wards: All

### **Subject:**

Lead officer: Sophie Ellis, Assistant Director of Business Improvement

Lead member: Cllr Allison, Deputy Leader and Cabinet Member for Finance

Contact officer: Sophie Ellis, Assistant Director of Business Improvement

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### **Recommendations:**

- A. That the Commission discuss and comment on the progress of the Customer Contact programme.
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## **1 PURPOSE OF REPORT AND EXECUTIVE SUMMARY**

- 1.1. The purpose of this report is to provide the Commission with a progress update on the Customer Contact programme.
- 1.2. The Commission last received a progress update in September 2015.

## **2 BACKGROUND**

- 2.1. The way in which Merton borough residents and service users want to access services is changing. People who routinely buy services and goods over the internet and by phone, and who communicate via SMS (text messaging), Facebook and Twitter increasingly expect the same sort of flexibility when accessing public services. This is reflected in the results from Merton's residents' survey<sup>1</sup>.
- 2.2. Merton's Customer Contact programme is aimed at meeting these changing needs; it supports delivery of the ambition set out in the council's Customer Contact Strategy. This strategy focuses on two key outcomes. Firstly, to improve service users' experience of accessing council services; and secondly to reduce the cost of those services by encouraging people to self-serve where possible and also by responding to as many customer queries as possible at the first point of contact (thus reducing avoidable and repeat contact).
- 2.3. The scope of the programme is to procure and implement the necessary technology to deliver these ambitions. This includes a new website that increases the potential for customers to request and pay for services online; the ability for customers to have an 'account' that allows them to track their queries and interactions in a single place online; and a contact management

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<sup>1</sup> [http://www.merton.gov.uk/presentation\\_charts\\_merton\\_residents\\_2014\\_.pdf](http://www.merton.gov.uk/presentation_charts_merton_residents_2014_.pdf)

solution that allows staff to manage and process queries and requests quickly and easily and which is integrated with the relevant back office systems.

- 2.4. In March 2015 the council awarded a contract to General Dynamics IT Ltd (henceforth GDIT) to deliver this technology and support the associated changes in business processes and practices.
- 2.5. Following a period of familiarisation and initiation a final detailed implementation plan for the programme was agreed by the programme board in September 2015.

### **3 ACTIVITY SINCE LAST UPDATE**

- 3.1. The remainder of this section will provide an update on key deliverables, both in terms of key milestones and work to date.

#### **3.2. Technology**

- 3.2.1 This stream of work will implement the underlying hardware (servers etc.) and associated technology (connections to the council's existing systems and networks) to support the new systems being implemented. It also involves configuring the software itself to meet Merton's needs and accommodate our ambitious objectives. It will impact on the experience of both staff and customers as it provides the IT system that contact centre staff will use to record and deal with customer enquiries in person and over the telephone and also makes sure that this is connected to other council systems so that referral of requests can be automated. This is important as it allows us to increase the number of calls where we can deal with enquiries at the first point of contact.
- 3.2.2 This activity commenced immediately post contract award and a major deliverable will be released at the end of March 2016 when the new contact management system will be launched in the Contact Centre, and a new operating system derived from this will be deployed in the Waste service.
- 3.2.3 The connections and Infrastructure between Merton's primary and secondary data centres and the supplier's data centres has been established and access is now available to the pre-production environments for both CRM and EDRMS. The fail-over and business continuity at both ends has been successfully tested.
- 3.2.4 The interface with Merton's electronic payments system has been established and tested as well as integration with Merton's address and property gazetteer. Work is on-going to interface with Merton's mapping solution, financial system, scanning, and other line of business systems on a prioritised basis.

#### **3.3. Website**

- 3.3.1 This stream of work will design and implement a new council website that is both modern and attractive and, more importantly, encourages and allows visitors to resolve more of their queries and requests online.
- 3.3.2 The current website was designed in 2005. Like most local authority websites, it was established before online functionality was an objective of

the organisation and therefore was primarily a place people visited to obtain information, not conduct transactions. The SOCITM survey indicates that user satisfaction for the current website is relatively high; but the lack of a responsive design and online functionality leaves Merton behind in terms of its overall website rating in SOCITM research.

- 3.3.3 Council officers have been working closely with GDIT's experienced and professional designers using a 'User Centred Design' methodology, which means that rather than starting the design process with the structure of other local authority sites, the design of the Merton site has been led by resident demand. This increases the likelihood of the council achieving its goal of channel shift.
- 3.3.4 Elected Members and staff have been consulted about the proposed website, using static copies of the proposed web pages . Following this consultation, the key changes that the new site will introduce are:
- It is less cluttered and more focused on transactions, designed to enable online visitors to quickly and easily conduct business with the council.
  - It is designed to be used on smartphones and tablets – recent research by SOCITM shows that 42% of visits to Council websites are made using a smartphone. However customer's mobile experience of council websites tends to be around 25% worse than on a desktop device and Google rate just 51% of council websites as 'mobile friendly'.
  - It is integrated with back-office-systems so that customers can complete an entire transaction online without having to contact the council in a number of key service areas (see appendix 1).
- 3.3.5 More comprehensive consultation with a range of community representatives is planned as soon as a test version of the working site is made available; this was expected in late March/early April although connectivity issues present some risk to this timescale. In addition, detailed User Acceptance Testing will be undertaken with a group of resident representatives and staff.
- 3.3.6 The transition from the current to the new site will be gradual throughout the remainder of 2016. Copywriters are currently reviewing content to ensure it is appropriate for the new website, and new functionality will be released throughout the summer as business processes are automated and integrated into the website (see item 3.5 below).
- 3.3.7 This workstream will continue to the delivery of the new website, which is anticipated in April 2016. This timeline is subject to feedback following consultation with users throughout the process.
- 3.3.8 The programme will also consolidate a number of micro-sites currently either outside the Council's infrastructure or not integrated into a direct navigation from our website. This will involve close liaison with services to either migrate a technical solution, or build existing micro-sites into our new website. This is a cost effective approach, avoiding separate hosting costs, but also benefits customers who will be able to find the services they want and be assured that they are dealing with the council. The programme is also ensuring that new requests for micro-sites are subject to this process.

### 3.4. **Customer account**

- 3.4.1 This workstream will create the functionality that allows visitors to the website to create an online account. This will allow them to sign into a secure space within the website where they can see their history of interactions with the council, the status of any queries or requests they have raised as well as things like their Council Tax account balance or outstanding library books.
- 3.4.2 This is important because people are increasingly expecting public services to be delivered in an holistic way and that the council is proactive in interpreting their requirements and responding to them swiftly. When someone contacts the council they expect that there is a coherent and complete 'view' of them within the organisation – this is their experience of other organisations so why not the council? Customers do not want to speak to several different departments and service teams about the same issue, which means that services can no longer afford for their business systems and their relationships with customers to exist in isolation. For the sake of good customer experience, and effective and efficient services, a single, comprehensive view of customers across the organisation is needed.
- 3.4.3 Work to design the account function and establish how it relates to and is positioned within the website has already been completed. But the implementation of the account cannot proceed until both the new website and online transactions are available. For this reason, the account function is not anticipated to be launched before the summer of 2016. This will allow time for the appropriate integration to be designed with other council systems (so that information from a range of places can be drawn together and displayed in the customer account page).

### 3.5. **Redesigned business processes**

- 3.5.1 A number of council services have been selected to undergo process redesign. These represent high volume, low complexity transactional services that are most likely to benefit from re-design and automation to produce an 'End to End' online service. These are: Waste, Highways, Parks and Green Spaces, Building Control, Property, Complaints and Freedom of Information requests, and Mayor's Charitable Events. In addition existing portals for Council Tax, Libraries, Planning, and Parking will be linked to the new customer account to allow customers to use a single password to access their information and services.
- 3.5.2 We will be able to provide a significant number of our services to customers through easy to find and use interactive web forms, to the high standard expected from an online service provider. The new process will enable customers to receive information and updates in the way they prefer, perhaps by text message, and through the customer account to record and consolidate all their transactions in one place.
- 3.5.3 The waste service processes have been redesigned and are now in the process of being developed as automated processes. These will be launched in late March/early April and will be accessed through the parallel launch of the new website and webforms.

3.5.4 The current roll-out plan will deploy the remainder of the designated services in two more phases, with Complaints/Freedom of Information requests in May and the remainder in June 2016. This may be subject to change depending upon the complexity of the design and integration with other systems and projects. It will also demand coordinating activity in parallel workstreams that will require increased resources from both the supplier and the council. This is being overseen by the programme board.

### 3.6. **Dialogue with GDIT**

3.6.1 Notwithstanding the progress noted above, the programme has experienced some delays. These are related chiefly to:

- unexpected technical challenges in creating connections to the council's existing systems and networks (related to third party telecom providers);
- difficulty in recruiting and retaining high calibre staff on the part of the contracted provider, GDIT;
- underestimation of the effort and complexity involved to deliver the first phase of the project, involving building the technical and operational infrastructure and specifically to deliver a new operating system for the waste service;
- the need to adjust the roll-out plan to accommodate a very volatile IT environment involving major changes and upgrades, such as for asset management, finance, and mapping.

3.6.2 The council has therefore deployed the mechanisms within the contract to alert GDIT to their concerns over these delays. GDIT have responded positively and submitted a correction plan, which, at the time of writing this report, is being considered by the programme board for approval. This includes revised delivery dates and these will be considered in the context of their impact on the organisation – both financial and reputational.

## 4 **ALTERNATIVE OPTIONS**

4.1. Feasible and cost-effective alternatives for the technology have been explored as part of the competitive dialogue process, ensuring the council identified the solution that best meets its requirements in terms of cost and quality.

## 5 **CONSULTATION UNDERTAKEN OR PROPOSED**

5.1. The governance arrangements for the programme are designed to ensure that services across the organisation are fully engaged in the development of the approach.

5.2. Governance for the programme consists of a Programme Board (management and control focus) chaired by Caroline Holland, Corporate Services Director (programme sponsor) and including representation from each of the departments. The programme also reports monthly to the

Merton Improvement Board which draws its membership from across the organisation.

- 5.3. An engagement and communication plan has been developed and service and customer groups are being engaged as part of the programme using a phased approach to ensure any necessary change is well planned, communicated and embedded.
- 5.4. It may be necessary to undertake formal consultation to reflect specific changes to how services are delivered via specific access channels as the programme progresses and the programme will provide regular updates to the Commission in this regard.
- 5.5. A key area for wider consultation is the development of the website and customer account. It is inadvisable to draw customers into the initial design process as they are better engaged in testing concepts once they've been developed. To begin with, therefore, the design process brought together a representative group of officers and asked them to take on customer personas and, later on, test the emerging design. Two sessions were also held in December to seek Member feedback on the proposed functionality and design.
- 5.6. As is noted in item 3.3.5 of this report, customers and external focus groups are being engaged in the process of testing the prototype as it emerges.

## **6 TIMETABLE**

- 6.1. A programme timetable is presented in appendix A.

## **7 FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS**

- 7.1. The Customer Contact programme is an important factor in the overarching transformation of the organisation as part of the Outstanding Council Programme. There is a clear commitment to a high standard of professionalism and the streamlining of work processes so that they are efficient and not unnecessarily bureaucratic. It is essential that officers are supported to make this transition and enabled to continue providing high quality services to customers in a constrained economic environment. It is also essential that the organisation is able to respond effectively to the changing needs of service users. Funds have already been earmarked through allocated reserves to facilitate the programme. This planned one-off investment is expected to achieve ongoing revenue savings that will benefit the council each year.
- 7.2. The programme is key to the achievement of planned savings through self-service and channel shift and the aspirations set out in a number of service target operating models (TOMs) are dependent on the technology the programme will introduce. The business case for the programme – in relation to benefits and savings – will be updated once the scope of implementation and cost of technology become clear as part of the procurement exercise.

- 7.3. The initial programme budget of up to £2.3m was approved by Cabinet on 12th July 2012.
- 7.4. Any property implications are likely to come from the assessment of the provision of face-to-face services in specific locations across the borough. It is expected that any such implications will be managed and aligned with any existing property rationalisation plans, e.g. the flexible working programme.

## **8 LEGAL AND STATUTORY IMPLICATIONS**

- 8.1. The South London Legal Partnership is working closely with the programme team in developing a suitable contract with the chosen supplier.
- 8.2. There may be some impact on the provision of some statutory services, e.g. regulatory services, but this will be established and managed through the engagement of the relevant services and will depend on whether specific processes can feasibly be delivered through different channels and by different means.

## **9 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS**

- 9.1. There are not expected to be any human rights issues from the programme.
- 9.2. An Equality Analysis has been completed for the programme and will be updated at suitable decision points.
- 9.3. Community and other key stakeholder groups will be engaged as part of the programme and any implications will be managed with the relevant officers in the Council.

## **10 CRIME AND DISORDER IMPLICATIONS**

- 10.1. There are not expected to be any crime and disorder implications.

## **11 RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS**

- 11.1. All risks, assumptions, issues and dependencies are being actively managed as part of the programme.
- 11.2. There are not expected to be any Health and Safety implications.

## **12 APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT**

A. Programme Milestones

## **13 BACKGROUND PAPERS**

- 13.1. Previous Cabinet Reports (for information only; not provided)

13.2. Customer Contact Strategy (for information only; not provided)