

Committee: OSC

Date: 15 September 2015

Agenda item: Customer Contact Programme Update

Wards: All

Subject:

Lead officer: Sophie Ellis, Assistant Director of Business Improvement

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

Contact officer: Sophie Ellis, Assistant Director of Business Improvement

Recommendations:

- A. That the Commission discuss and comment upon 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.

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 increasingly expect the same sort of flexibility when accessing public services. This is reflected in the results from Merton's residents' survey¹.
- 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 refreshed 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 solution that allows staff to manage and process queries and

¹ http://www.merton.gov.uk/presentation_charts_merton_residents_2014_.pdf

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 to deliver this technology and support the associated changes in business processes and practices.

3 ACTIVITY SINCE LAST UPDATE

- 3.1. Following the contract award in April 2015 an induction process was undertaken to familiarise GIDT operatives with the operating context of the council, its technical infrastructure and architecture, governance arrangements, stakeholders and other initiatives that would impact on the programme. This was an intensive period of information sharing that was necessary to ensure that GDIT were able to refine their proposals to best fit with Merton's unique technical and organisational environment.
- 3.2. This supported the subsequent phase of activity, which was for GDIT and council officers to work together to develop and agree a more detailed implementation plan. Through the procurement exercise all Bidders were required to put forward outline plans, but these needed to be developed in greater detail which required a fuller understanding of the council's operating context.
- 3.3. The detailed implementation plan was agreed by the programme board on 27 July 2015. The remainder of this section will provide an update on key deliverables, both in terms of key milestones and work to date.
- 3.4. **Technology**
 - 3.4.1 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 customers and staff 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.
 - 3.4.2 This activity commenced immediately post contract award and is due to complete in April 2016 as it will continue to run in parallel with delivery of the elements of the solution.
 - 3.4.3 The solution provided by GDIT will deliver a new primary dedicated network line into the Merton datacentre and a new secondary dedicated network line into the Wandsworth datacentre. GDIT have been working with the telecom providers to secure these new lines and to date have only been able to complete the connection to Wandsworth. They have experienced delays with the telecom provider in completing the connection to Merton. As a work-around considerations are being given as to temporarily routing the primary network through Wandsworth so as to not delay the progress of the

project. Once the network routing is in place work can commence on testing and planning for system integrations and data migration.

3.5. **Website**

3.5.1 This stream of work will design and implement a new council website that is both modern and attractive but, more importantly, encourages and allows visitors to resolve more of their queries and requests online.

3.5.2 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 first and foremost 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.

3.5.3 GDIT began their preparatory work in April and have undertaken benchmarking as well as analysis of how the current site is used. This research is being used to understand the types of customer journeys that will be most popular and therefore drive the functionality and design of the site. Experienced and professional designers are facilitating the process 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 will be led by resident demand. This increases the likelihood of the council achieving its goal of channel shift.

3.5.4 The key design principles that have been developed to underpin the new website are:

- It must be designed from the outset to be accessed via a smartphone – 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 must be 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 and therefore be more slick and functional. It thereby also avoids the need for council staff to re-key information.
- It must be easy for people with all levels of ability to use.
- It must be uncluttered and focused on transactions, designed to enable online visitors to quickly and easily conduct business with the council.
- Whilst it is accepted that there will be less of a focus on news stories and service information, the site must retain a sense of locality and allow users to identify with Merton the borough. This is important to the place- and community-shaping role of the council.

3.5.5 This workstream will continue to the delivery of the new website which is currently anticipated in January 2016. This timeline is subject to feedback following consultation with users throughout the process.

3.6. **Customer account**

3.6.1 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.

3.6.2 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, compliant with all aspects of data protection, and effective and efficient services, a single, comprehensive view of customers across the organisation is needed.

3.6.3 Work to design the account function and establish how it relates to, and is positioned within, the website is already underway. But the implementation of the account cannot proceed until the new website has been launched. For this reason, the account function is not anticipated to be launched before April 2016. This will allow time for the appropriate integration to be designed with other council systems (so that information can from a range of places can be drawn together and displayed in the customer account page). The account will also be linked to other existing council portals, such as in the Library service, and will provide users with the capability to sign in with a single password, presenting a unified website thereby eliminating the often irritating need to remember and use multiple passwords.

3.7. **Redesigned business processes**

3.7.1 A number of council services have been selected to undergo process re-design. 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 Fols, and Mayor's Charitable Events. In addition existing council 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.

3.7.2 We will be able to provide a significant number of our services to customers through easy to find and use 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.

- 3.7.3 The Waste service processes are close to completion, to be followed by Parks and Green Spaces, with the remainder of the Pathfinder services implemented over the following 6 months. Highways services have been re-scheduled to align with the re-procurement of the council's asset management system in March 2016. The implementation of these changes within the services will be managed through the Target Operating Model (TOM) process, and will therefore monitor and control where the demand for services, and means of accessing them change.

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 which 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 2015 board which draws its membership from across the organisation.
- 5.3. A draft ownership and communication plan has been developed and service and customer groups will be 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 periodic updates to the Commission.
- 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 has brought together a representative group of officers (who may also be residents of the borough) and asked them to take on customer personas and, later on, test the emerging design. At the point that a prototype is available customers and external focus groups will be engaged in the process of testing. We also have the opportunity to work with a neighbouring Council to user test the website as a 'critical friend'.

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.
- 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 worked 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 will 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)

Appendix A – Programme Milestones

