



Attachment 3

Central Bedfordshire Council

Development of Digital Customer Services

May 2015



DRAFT

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Executive Summary

The four-year journey to move Central Bedfordshire's customer engagement to encompass a fully on line, digital experience has been arduous. Several successes have been recorded and the Council has moved forward, but technical obstacles encountered have slowed the pace of development. There is now a wish to speed up and enhance that journey, to accelerate the digital agenda and to prepare the Council for the financial and operational demands that lie ahead.

To this end, it is fitting to republish a Digital Customer Strategy and Roadmap for the Council, to reaffirm the objectives of the programme and to outline a pathway forward that will accelerate change, improve services and support operational efficiencies.

Proposals and Recommendations

Moving forward, three proposals for change in the approach to Digital Transformation are made. The rationale for the changes comes from past experience with the programme on what aspects have worked and those that have delivered less than anticipated. Additionally a change to the overall focus of the Council in addressing digitalisation is made.

1. Customer First, Change of Technical Approach to allow the best overall value delivery of resident self service and channel shift, including third party delivery, moving away from an exclusive CRM centric approach.
2. Customer First, Broadening of Objectives to include all externally facing Council processes to assure that any resident has access to Council services via digital means of their choice at any time.
3. Close Coordination of the Internally focused Paper Lite processes with Customer First programme to assure that all Council processes, both internal and external, are part of the transformation programme.
4. Creation of a Single Board to address transformation, customer strategy and strategic development.

The Digital Face of the Council

There are several related development streams that are currently working as separate undertakings that need to be brought together into a single vision for the Council. The objective needs to be a single digital footprint, or digital vision for the Council.

Currently separate digital related developments are taking place in these areas:

- CRM Customer Portal
- Customer Contact Centre
- CBC Internet Development
- Multiple Service Unit Internet Instances.
- Various mobile applications

- Development of extensions to Line of Business Applications for Digital Delivery

To give a commercial analogy as to why this should change: Individuals would expect to work with Amazon through a single web site or to have a single mobile application to address their needs. Customers of the Royal Bank of Scotland expect to have a single web site and single mobile app to handle their banking. When calling a customer contact centre for Amazon or RBS a person expects to have the same information and the same processes available as they would find on line. A call placed to a contact centre is very likely for additional support; not for a different process.

The Council's business needs to take the same approach if it wishes to be seen as a Council rather than as a bunch of individual business that present an uncoordinated face to the public.

For efficiency and speed of deployment, the Council needs to focus its resources and abilities on the **delivery of a single digital footprint** that spans the internet, customer contact centre and mobile environments. Financing, managing and supporting multiple disassociated digital entities slows down development, increases costs and dissipates resources.

Principles Guiding Transformation

To focus change and development, a set of Guiding Principles for Transformation have been adopted to provide a measure of success and to assure that digital enhance of services remains in the overall best interest of the Council's commitment to the community.

Golden Record of the Customer

That services deployed will contribute to a central record of activity of our residents that is accessible by our service agents to support informed, knowledge and tailored service delivery for each citizen. By knowing more about an individuals needs and requirements, the Council will be in a better position to provide effective support.

One Application per Function

To simplify the service, save costs and improve operations, the objective is to have a single application that provides the full range of services for the customer's request, and that can be used in the office, while mobile, through self service or any other digital means.

Elimination of Duplicated Applications

By reducing waste and inefficiency, in part by eliminating unnecessary duplication of system resources, the Council will have better means to provide the services the community requires.

Customer Self Service Integrated into the Back Office

An objective to provide not only self service for the customer, but also to have the results of the customer's efforts fully integrated into the back office systems that drive the Council, to eliminate redundant administrative processes.

Support for Flexible and Mobile Working

As the community goes more mobile and expectations rise that the Council services will be available through tablets and smartphones, the programme's objective is to make all processes available on any common device the resident would care to use.

Safe, Stable and Secure IT Systems

The first requirement is to assure that the Council's IT systems are available when required, that Council and resident data is maintained in a secure environment where unauthorised access is eliminated.

Great Information and Advice

Customer service is only as good as the information / results provided to the consumer. All Council systems must contribute to the ethos of great service, accurate information and helpful advice.

Objectives for Customer Service

Coinciding with a clear set of development principles, are the Council's Objectives for Customer Service. These are the guiding principles for service delivery.

Right Information at the Right Time

The availability of the correct information required by the resident at the time when the resident requires it. Societal expectations have moved on from a 9 to 4, wait in the queue for information mentality. Residents now expect the information and services that they need, without the queue and when they need it ... be that at 3am on a Sunday morning. The expectation is that it is always correct; internet life-styles expect that it is always available.

Easy and Clear Access

Consumer expectations are for simple and clear processes with a minimal number of steps, elimination of irrelevant and unnecessary information, quick delivery of results. Requirements must be clear; processes must be simple.

Full Transparency

Residents expect to understand the processes with which they engage. This means clear requirements, clear outcomes and access to status information if the results are not immediate. They need access to process information if the results are negative.

Positive and Supportive Experience

The universal requirement for all Customer Service: The feeling to have been treated fairly, with a positive attitude and that the agent or system processing the requirement was working in the customer's best interest.

Minimal Engagement with Clear Outcomes

A requirement for a quick service, with a minimum amount of overhead and non-essential effort and a clear outcome at the end. With either a positive or a negative result, the outcome should be clearly understood.

The Journey to Date

The Council's digital journey to date has been challenging. It began with a professional review of Council needs leading to a significant investment of both financial and human resources in a vendor supplied portal that technically failed. The programme from its beginning has been supported by a technical service unit that itself has struggled to bring together the technology and processes necessary to support the Customer First and the Council. Buy in and support for the transformation programme from Council services and directorates has fluctuated through time.

Despite these set backs the programme has delivered a working CRM solution for the Customer Contract Centre, moved and reformed the Customer Contact Centre itself, commissioned a highly successful Interactive Voice Recognition system for telephony and delivered the automation of a selection of high value processes.

Although Customer First programme has delivered on many of its project requirements, it is universally agreed that it needs to go through a major evolution both to addresses less successful aspects of it work and to meet new demands. These evolutionary aspects include:

1. Significantly speeding up the delivery programme.
2. Providing much better value for money in the delivery of services.
3. Broadening out the scope of the work to include ALL Council customer facing processes.
4. A clear emphasis on project delivery.
5. A much greater emphasis on mobile access and mobile working.
6. Creation of a Single Digital Face for the Council.

The Customer Experience

How should a resident experience the Digital Central Bedfordshire Council

Full Information

When I contacted the Council they had all of the information that I needed ready and waiting for me. No hunting around, misdirection or 'I'm not sure about that?'

Clear Understanding of Entitlements

In working with the Council it was clear what I was entitled to. They did not need to think about it for long periods of time or suggest that I go elsewhere to find out. They knew the rules and they helped me understand them.

Digital by Default

I could do everything myself. All the information was readily available, all of the forms were on line, the outcomes were quick and clearly posted. And I could do this in the evening after my children were in bed.

Full Web Access

Just as I would expect, all of the Council services were on line. I did not need to look elsewhere and I did not need to mail in a bunch of paper forms or documentation. I could just do it.

Ease of Working with the Council

Assuring that there is no need to make repetitive calls to the Council to re-register requirements or to check status of processes that have been initiated. The Customer Service needs to be right the first time, comprehensive and transparent.

Mobile Accessibility

But what I did not expect was that all of the Council services were available on my phone. I looked up the information that I needed and then decided to complete the information when I am home this evening as I like using a bigger screen too.

1 to 1 Support When Needed

My mother tried to apply on line also but her sight is not very good and she isn't used to working with computers, so she called the Council and a helpful Customer Service Agent helped her to fill out the forms on line so that she received the same great service.

The Council is Open for Digital Business (unless you need our support)

I received a clear message from my digital experiences with the Council – The Council is Open for Digital Business!

Customer First Development Going Forward

With management support, the development of Digital First for Central Bedfordshire will be accelerated with expectations that virtually all processes will be on line and digitally available by the end of 2017.

To accomplish this task, the development team will be increased in size, additional resources will be made available and a focus on use of a range of existing technologies will be introduced.

All developments will continue to follow the guiding principles set out again in this report both in terms of system development but also in terms of customer outcomes.

CBC Information Environment

The Council has a wide range of data that describes both our residents and the interactions that they have with the Council. Much of this data is held within line of business applications

Existing Internal Resources

Each of the existing internal line of business databases will continue to operate for the foreseeable future to support on-going business processes. Each has its own unique record of activities; many of these records are not replicated elsewhere in the council.

- Council Tax
- Personal Benefits
- Children' Services
- Adult Social Services
- Housing
- Parking
- Blue Badge Entitlements
- Voter Registration
- Waste Collections, assisted collections
- Waste Round information
- Fly Tipping and highway reports
- Local Land and Property Gazetteer

These amongst others can all provide insight into our residents, their needs and future demands on the council.

External Factors

The continuing demands of government are for greater data sharing possibilities amongst their various agencies and with selected third sector agencies. The data sharing fortunately goes both ways and the Council can benefit from information held by the NHS, Mental Health, Police and charitable organisation working in the Central Bedfordshire area to improve the Council's understanding of its residents.

Better management information can lead to better decision making.

Client Index / Single View of the Customer / Golden Thread

The challenge facing the Council is how to use the wide range of information it holds. Currently that information is fragmented and held in bits and bytes in multiple databases. It is a case of the Council not knowing what it knows.

The use of the CRM system is beginning to collect valuable information about residents into a single database for those processes that are programmed through CRM. However, the Council's prior experience has shown that the cost of redeveloping all Council processes to work with a single new CRM database is simply too expensive and too time consuming to undertake at this time. Fortunately other technologies exist that can support the aggregation of resident data and that can allow us to continue to work with CRM.

A process that can be used to get the interesting information together in one place for analysis and review, is by aggregating it together in a separate process. The aggregation process simply selects the information that it wants from the databases from which it wants to have it, and then moves a copy to a new database where it is joined with similar information from the other line of business applications.

The Role of CRM and MDM

CRM plays an important role in collecting information about Council residents. But not all Council residents will either call the contact centre or use one of the processes automated by CRM. A rough estimate is that possibly only 15% or fewer of Council Residents are known to the CRM. Information on non-CRM users and on non-service users needs to be consolidated by some means, and that is where the data aggregation technologies play a key role.

Creating the Single Record

This process of aggregation goes by several names – Single View of the Customer, Client Index, Master Data Management. But the naming is not important; the creation of a single point of reference to the needs and requirements of CBC residents provides a starting point to development a management regime of decision taking based on information.

CBC and Citizen Analytics

The non-technical challenge of central data management is what to do with the information once it is brought together. Use of the information is down to the Council's ability to successfully work with data and to draw abstract conclusions.

Current successful endeavours include discovering and engaging with Troubled Families and attempts to predict service requirements based on held demographic information.

Forensics/Audit

A centralise data repository can support forensic work in fraud detection by highlighting potential duplicate claims for housing, blue badges, welfare claims and licensing. Usually the cost of creating the database can be offset through fraudulent claims recovery, leaving the database as a free resource for other Council uses.

We are not alone ...

The Council is only part of the government and service picture in Central Bedfordshire. Health and Mental Health services are active, doctors' surgeries, police fire and the third sector are all active. Each holds valuable information concerning the Council's residents.

Data Sharing with Peers

The government's data sharing agenda increase year on year as more and more demands are made for bilateral data sharing. Having all of the Council's relevant information in one place, accessible from one database, is a huge step forward towards effective data sharing. Easier to share from one data base than from 10.

Data Integrity

As data – names, addresses and events – can be compared from one database to the next, regimes to check and improve the data quality of each database are enhanced. The technology used to consolidate the databases is oftentimes the same technology that would be used to introduce a data quality control regime on a single database.

Integrating Analytics into Council Decision Making

With the Council's information on resident requirements and process requests brought together into one place, the ability is created to merge that data with data from external sources and peer organisations to give a richer view of present and future needs. The question of who is best placed to analyse the data, ask the appropriate questions and work with the resultant findings. At the moment, the Council does not have a person or a group of persons in a position to fully exploit this potential new resource. Going forward, the Council's strategy on engagement with our residents will determine analytical needs of the programme.

Thin Provisioning for Internal Processes

To achieve the benefits promised by digital transformation it is not enough to simply move business processes on line. The Council must plan to take advantage of the shift and of the efficiencies offered.

As each process moves towards greater automation, advantage will be gained in terms of lower operating costs, freeing up resources to improve service and to provide the maximum benefit to the community.

Reducing overheads associated with service delivery is a continuous demand; digital transformation allows for a step increase in performance to take place within the Council's service units. The operative word is *allows*. Each service unit going forward will take responsibility to assure that the full potential of moving to a digital organisation is realised, that when demands for existing resources are reduced, those resources are relinquished to benefit all Council service users.

Training for Great Customer Service

Great Customer Service does not just happen it is a result of a dedicated teams that are focused on outcomes and that are eager to continuously improve their service delivery. The CBC Customer Service Centre will continue to improve its already successful training programme to assure that face to face and telephone customer services continue to evolve.

But Customer Service is not just the remit of the Customer Service team, and, it is not just how the Council works with its residents. It is also how Council staff work with each other, how CBC teams work with third party organisations, contractors and our wide range of stakeholders.

To meet the demand for the broader Customer Service improvements and to assure that all Council staff represent CBC in a positive and professional manner in all of their dealings, an on line training programme is being put in place to run along side of training for data protection and security.

Assuring that all CBC staff are reminded of and given clear guidance in how to work effectively is a key outcome.

Communicating with our Residents

Central Bedfordshire Council provides great services to its community. Residents who visit a contact centre or who call into one of the Council's offices will know that. The vast majority of our residents never visit a Council office and possibly never need to call the Council.

Reminding all residents of the work of the Council through the communications channels open to us – The Internet, Mobile Applications, materials included in bulk mailings, sign posting at drop in centres – can work as continuous and positive reminders that their Council taxes are in good hands.

The Internet

During 2015 the Council Internet site – www.centralbedfordshire.gov.uk - will be rebuilt to accomplish a series of objectives. The new site available at the end of the year will have better and more timely content, more appealing layout, better navigation and better access to online services.

The Internet will fulfil its primary functions:

- Provide access to all Council Service On Line
- Provide clear and comprehensive information about the Council and its services
- Present topical information about the Council and its activities
- Highlight our communities, their involvement with the Council and the strategic plans for continued development.
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Mobile Applications

As the community shifts to using mobile technologies for their daily requirements, moving away from the more conventional use of telephones, direct contact and office based products, the Council will move with them. Initial trials of mobile reporting apps have clearly shown what works and what needs improvement – how the Council can take best advantage of the mobile world.

The next generation of apps to be developed as part of the continuing Customer Strategy will provide direct access to those Council services that residents expect to have available.

Mobile Working

In addition to providing mobile apps for residents to interact with Council systems and information management, the transformation programme will be working with internal service units to provide greater versatility. The initial focus on enabling CBC Business Units to engage more effectively while mobile will be directed towards the Social Services, Housing and commercial services.

Mobile working is about more than the ability to take the CBC computer desktop along while working outside of the Council's buildings. The style and focus of mobile is about ease of access, right information at the right time, simplified processes and independent working.

Channel Shift

All of the Council's services need to be available on the Internet, mobile devices, by telephone, by email, written correspondence or face to face. The Council however does not need to present the services as equal.

Digital First means presenting on line self service as the preferred route. Best for the Council, best for the Council's residents that all persons can conveniently self serve via the Internet. If, for some reason, working over the internal is neither possible nor practical for a resident then all of the other channels are open for them to use and to receive the same great service.

Digital First helps everyone. Providing good professional services by other means for those who cannot self serve is a fundamental Council remit.

Internal Communications and Content Management

Everyday Council staff come and go from offices, many residents attend drop in centres, libraries, customer service facilities. Each time a person walks past an open wall or a screen there is a potential to communicate, to make a point, pass on a message or to provide information.

With literally hundreds of such potential points, automating the communications process is essential. To achieve this an Internal Content Management System is planned that will allow central communications, librarians and service personnel to plan and distribute graphically interesting displays, graphics, videos and other communication pieces to all of the public screens in all of the Council's buildings.

The Content Management System not only means that communications can be improved and enhanced but also that the public environments in our buildings become more graphically pleasing and interesting.

Working with Others

Recent government initiatives have all been about collaborative working in the community, working with other governmental organisations, working with the third sector, working with volunteers. The Council has an obvious role to play in assuring that the Council's Customer Service is first rate in working with the others. Less obviously, but equally important, is to assure that the Customer Service provided by the joint service is up to the Council's standards. The assurance that if the Council is associated with a group, that that groups customer services meet CBC standards.

The Internal Paper Lite Story

Along side of the development of fully digitised council services for the community – the Customer First remit – is an internal council development to move all internal processes to automated, online processes.

This internal programme, an ICT Initiative entitled Paper Lite, has the objective to move all internal processes away from paper and in to the digital age. Outcomes envisioned:

- Great efficiency through automation
- Greater internal control through visibility of processes
- Greater mobility through access from any where
- Change in staff perception to a vision of the digital age

Methodology to Deliver Results

The methodology being deployed to achieve the objects of improved customer services, improved efficiency and a comprehensive move into the digital age is a Clean Sweep approach.

- The Council knows the processes that it has in place
- The Council knows the resources at hand
- The development team will move from one process to the next on a priority basis, and take the necessary steps to
 - fully digitise the customer facing processes,
 - assure that they are integrated into the back offices systems,
 - provide customer tracking and feedback as required,
 - record the transaction to allow for meaningful management information to be produced.
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When the last process will have been fully delivered as a multi-channel, self service application the job will have been done.

Timescales

The target of the Customer Strategy is to have achieved full shift to on line services by the end of 2017.

Resources

Resources to support the development required are coming from two main Council sources. The annual capital grants to ICT for IT development and infrastructure upkeep are being focused on the deliver of enabling technology for record management, data management, infrastructure and mobile working.

Direct grants are being made to the Customer First programme to enable the work to continue at pace.

The Next Tranche of Development

The next tranche of development will focus on fully automating the processes that go through the Customer Contact Centre and assure that all processes supported by it fully available for resident self service. The contact centre focus:

Blue Badge	Council and Democracy
Carers	Home and Environment
Highways	Health and Caring
ICT (Internal)	Learning
HR Recruitment	Money and Benefits (Revs and Bens)
Councillor	Leisure and Culture
Older Peoples Team	Travelling
Occupational Therapy	Electoral Service
Public Transport	Planning and Business

Registrations - Births, deaths, marriages	Free School Meals
School Transport	Physical Disabilities
Waste	Housing

Success Looks Like ...

- A resident goes to the Council web sit and easily finds the information that they require on any Council service and can clearly communicate with the Council or facilitate the c that they require.
- A resident calling the Customer Centre receives the same information and is supported in transacting with the Council in just the same as manner as if they had self-served on the web site.
- A resident with a mobile device feels just as empowered to work with the Council as if they were seated at home in front of their laptop.
- A Council worker understands where to find information about Council process and how they work and can do so with ease.
- A Council worker understands what is expected of them, how the Council works and how they fit in.
- A Council worker knows that they are the key ingredient for excellent Customer Service.
- A Council worker, when asked, responds that they work in the digital age; that they are proud to work for the Council.

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