

Our approach to digitisation: progress report

Cllr Liz Little, Cabinet Member for Corporate Services & Customer Services, Revenues and Benefits

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Key Decision? NO

Local Ward Members None – not geographically specific



Strategic (O&S)
Committee

1. Executive Summary

- 1.1 The committee received a report and presentation in November 2017 that outlined the council's emerging approach to channel shift and digitisation, in line with the council's Strategic Plan 2016 – 2020 ambitions.
- 1.2 The council's Strategic Plan sets out our ambition to become a council that is 'fit for the future'. This includes:
 - Making top services fully bookable online and so easy to use that people go online as a first port of call.
 - Increasing productivity and efficiency through fast and fundamental Fit for the Future reviews.
 - To deliver good customer services and to develop innovative approaches to generate income.
- 1.3 The paper described five strategic projects that had been identified to deliver the above ambitions, as part of a new digitisation programme, including a new CRM system, an online revenues and benefits system, a line of business system for environmental health, a committee management system and the introduction of online direct debits.
- 1.4 The committee also noted that a cross-departmental officer working group had been established to provide direction and drive forward the programme, and that it had adopted a vision: **'One customer, one council, one good experience'** and a number of principles to inform investment and development decisions.
- 1.5 These principles include:
 - Consistent customer experience – no matter what system.
 - It's easy for our customers to deal with us.
 - We recognise what good looks like and strive for it.
 - We maintain our independence/fleetness of foot to deliver.
 - We target resources at the best possible solutions.
 - We aim to minimise the amount of times we handle data – and errors.
 - We deal with a limited number of solutions providers that take messages from customers to back end systems and back again.
 - Our system choices drive real savings – we buy cleverly and purchase at the best price.
 - Our approach leaves time to deal with the customers who need more help.
- 1.6 The committee has also established an Innovation Task Group, which has embraced the opportunity to be involved in customer testing and has fed into testing of the new garden waste online form, bulky waste, scrap metal, additional blue bins, assisted collections, replacement bins and the new online revenues and benefits system. This feedback has helped to shape the processes and ensure they are more customer friendly/usable.

- 1.7 This paper provides an update on our work to deliver channel shift and digitisation and outlines the progress that has been made in delivering the five strategic projects. It also explains how this work dovetails into the council's emerging Digital Strategy, set to be considered by Cabinet in December 2018.
- 1.8 It also describes how this work will continue, and the need for ongoing input from the Innovation Task Group to test new customer facing online processes as they are developed - ranging from new street scene processes (abandoned vehicle reporting, graffiti reporting etc in the new year), through to new environmental health processes and new street trading processes early/mid 2019.
- 1.9 The identification of processes to be digitised – and their priority for delivery - is informed by the Fit for the Future programme and its reviews into services / systems. Only where a process is strategically important, where the volumes are high, and there is the real prospect of return on investment because we are able to drive out inefficiency, increase income or improve the customer experience is it being prioritised for digitisation.

2. Recommendations

It is recommended that the committee:

- 2.1 Notes the contents of the report.
- 2.2 Notes the need for ongoing input from the Innovation Task Group to test new emerging customer facing online processes.
- 2.3 Considers the membership of the Innovation Task Group to ensure members still have the capacity to contribute, given recent council changes.

3. Background

Progress on the five strategic projects

- 3.1 Five strategic projects were identified at the start of the programme. Attached at **Appendix A** is detail regarding each of the 5 strategic projects, what they will do, progress and anticipated benefits. Headline progress is detailed below:

| Project | Current status |
|--|---|
| <p>Introduce a new customer account, online forms, CRM (customer relationship management) system and key integrations with property, payments and waste systems.</p> <p>(Cabinet approval – July 2017)</p> | <ul style="list-style-type: none"> • A new CRM system, customer account and online forms package (Jadu) has been launched. • The system now supports all customer contacts in waste, including garden waste and requests for additional or replacement bins, bulky and scrap metal collections, assisted collections and missed bins. • As well as helping to generate over £1.5m from garden waste sales, the system supported over 70% of transactions to be made online, reducing pressure and additional resource demands on the Lichfield Connects team. • It is also estimated the new processes have saved in excess of £20,000 in officer time, as customers have self-served. This has allowed the Connects team to absorb the impact of the garden waste service and take on new services. • Street scene processes (including reporting graffiti and abandoned vehicles) have been developed and are being tested by the team, before being rolled out online to customers. • New street trading processes are currently being developed to support the roll out of the new street trading/special event policy. |

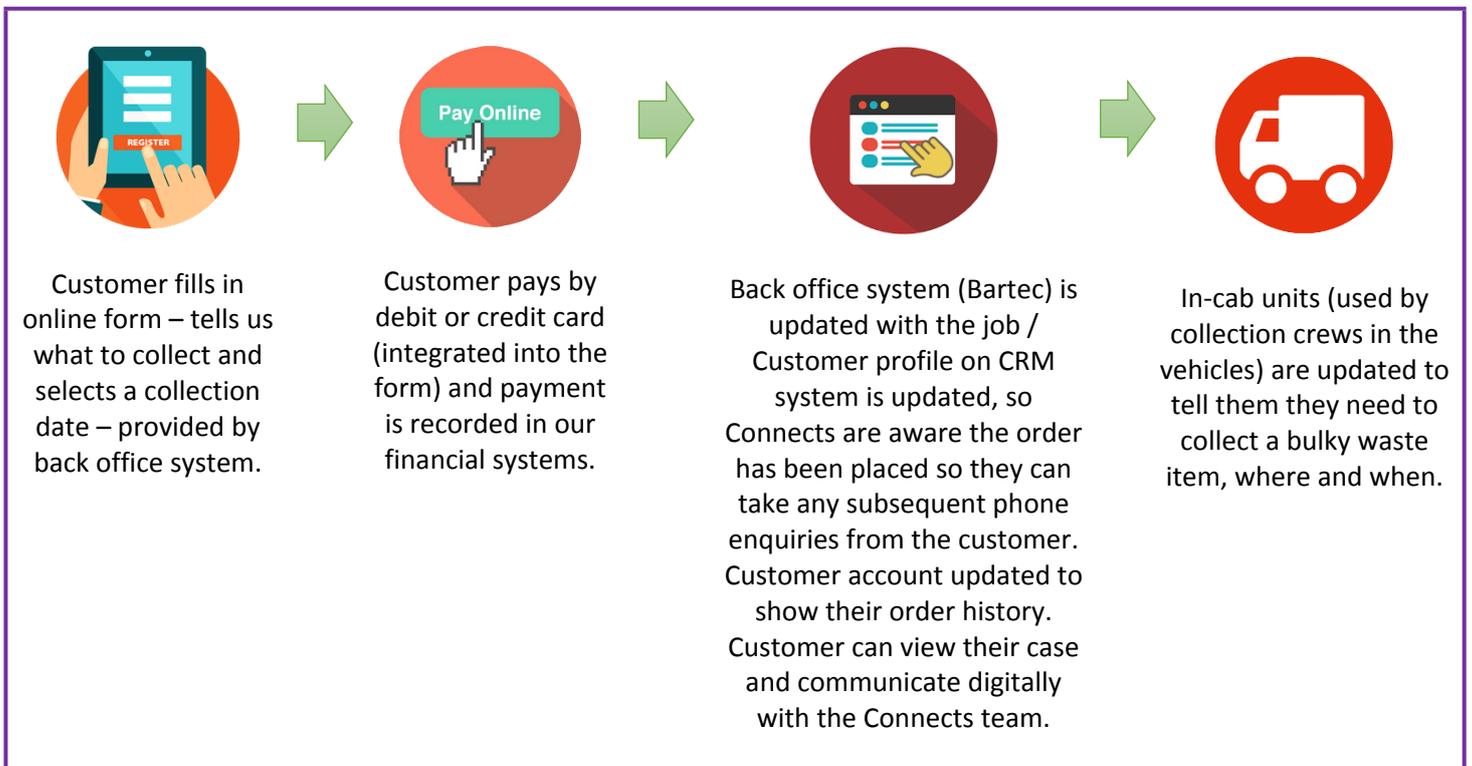
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| | <ul style="list-style-type: none"> • Work is also underway with the key suppliers to develop key integrations to enable environmental health requests (such as pollution complaints) and potentially licensing applications to be submitted via the same system. This is subject to supplier cooperation and the work to date is looking positive. • It is hoped that the Innovation Task Group will help with user testing before new customer facing processes are launched, with the first processes due in the new year (street scene). |
| <p>Launch revenues and benefits forms - that integrate into the customer account & revenues and benefits system (iWorld from Northgate)</p> <p>(Cabinet approval – September 2017)</p> | <ul style="list-style-type: none"> • New forms for council tax, benefits and business rates up and running. • A new landlords' portal has been launched. • Integration with single customer account is currently in the testing phase. • It is hoped that the Innovation Task Group can help with customer testing ahead of a major marketing campaign to promote paperless council tax billing and benefits notifications. • The new system has already allowed one vacant post to be deleted and has reduced the need to increase the size of the billing team to accommodate property growth. • It is anticipated further savings may materialise dependent on the take up of e-billing and e-notifications. |
| <p>Launch a committee services line of business system and digital council papers/app</p> <p>(Cabinet approval – October 2017)</p> | <ul style="list-style-type: none"> • Online and mobile system from ModernGov have been launched for staff and members to access/read committee papers. • The Forward Plan and member details are also published in Modgov. • All meeting papers from February 2018 are now published in ModGov with earlier documents expected to be re-published in the near future. • Roll-out plans for driving up usage of the system with both members and officers are currently being prepared. • Our ambition is that all council meetings will be paperless from next June, following the elections. • So far, the introduction of Modgov has improved the efficiency of the committee services team and it is expected that there will be cashable savings realised, with the move to paperless meetings. |
| <p>Implement an environmental health line of business system, a replacement DMS (a document management system) for planning and building control and other IDOX modules.</p> <p>(Cabinet approval – February 2018)</p> | <ul style="list-style-type: none"> • A new document management system for planning and building control was launched in September and has improved internal team efficiency and the customer journey. This system will also underpin other IDOX modules. • IDOX modules for environmental health, housing, ASB, licensing, estates management, planning and building control have been commissioned and are in various stages of configuration, training and testing. • Robust project management is in place and implementation is going well and is on schedule and on budget. • The first back office processes – taxi licensing and anti-social behaviour – are set to go live by end of 2018. • Environmental health and estates management processes are expected to be rolled out early in 2019. • This system will generate significant efficiencies and improvements, including improvements in the customer experience, workflow and team resilience. It will also increase the security and accuracy of business data. |
| <p>Introduce a paperless direct debit payment facility.</p> | <ul style="list-style-type: none"> • This was considered in line with the introduction of year 1 garden waste. • At the time, the business case did not provide a robust argument in terms of costs or efficiency to support the necessary investment. • Whilst year 2 garden waste sales are progressing very well without online direct debits in place (over 5,000 sales as of 14 November), this is being revisited given member feedback/desire to see direct debits introduced. |

Customer access achievements

- 3.2 A key element of the digitisation programme is the ambition to ‘make our top services fully bookable online and so easy to use that people choose to go online as a first port of call.’ (Strategic Plan, 2016 – 2020)
- 3.3 The experience of garden waste sales, where over 70% of customers (c28,000) bought online, has proven the argument that if an online service is easy enough to use, customers are willing to adopt it.
- 3.4 Furthermore, take-up statistics on other online waste services that were launched between April and July 2018, show that in the two months since their launch, with minimal promotion, 1763 customers self-served (with no recorded complaints), saving the authority in excess 246 hours of officer contact time.
- 3.5 It is not just waste where the enthusiasm of residents to embrace our new systems has been evident. Without any promotion, other than on our website, nearly 1,000 residents have signed up to receive digital council tax bills, rather than paper copies. The customer experience of e-billing still needs to some testing and refinement, but it is interesting to note that despite this, residents are keen to embrace the opportunity to engage digitally.

Replicating the success of waste digitisation

- 3.6 Replicating the success achieved in waste services from a customer point of view is a key component of the programme moving forwards.
- 3.7 The key to the success of the waste services transformation work was the integration, and the relationship, the team fostered between the CRM/online forms company (Jadu) and the back office waste company (Bartec). This enabled end-to-end processes to be created that see the two suppliers’ systems talk to each other, with no human/back office interaction required.
- 3.8 An example of this is the bulky/scrap waste process, which has been used by 761 customers since its launch this summer:



- 3.9 With a number of back office/line of business systems in place at the council, replicating this integration work is key to creating both a good customer experience and solid back-office processes that work for the customer services team, as well as the teams delivering the services.
- 3.10 The level of integration and uniformity of customer experience that can be achieved will depend on the level of integration back office suppliers can/are willing to offer, and at times this may differ depending on system capability and opportunity cost/time to deliver.
- 3.11 An example of this is the revenues and benefits forms that were recently been launched and are being successfully used by customers.
- 3.12 Currently if a revenues/benefits/business rates customer wants to be 'remembered' on these forms, they have to create a customer profile (username/password) that is separate to their Jadu customer account – so they effectively have two profiles and two logins for interacting with the council.
- 3.13 This is not an ideal situation and we have worked closely with the suppliers involved (Northgate and Jadu) to improve this situation by allowing Jadu customers to sign-into their revenues, benefits or business rates accounts, by passing through their Jadu account. This will mean they will only ever have to remember one username and password. This is currently in test and set for launch this winter/spring.
- 3.14 It is hoped that the Innovation Task Group can help with customer testing of this customer journey, ahead of a major marketing campaign to encourage customers to sign up to paperless council tax billing and benefits notifications.

Our current challenge

- 3.15 Our challenge now is to:
- Replicate the success achieved in waste services across the full span of council services, where both the volume of contact justifies the investment and the process is strategically important.
 - Create full integrations where possible (e.g. replicate the waste experience) or partial integrations where full integrations are not possible (e.g. replicate the revs and bens experience) or agree an alternative/separate approach is most appropriate to the business/customer need.
 - Ensure the software we have purchased (both front end – Jadu) and existing/new line of business (various) are exploited to their fullest potential.
 - Embed/launch the online revenues and benefits single-sign-on to Jadu, as well as identify issues/lessons learned that need to be addressed through the overall Northgate re-rendering exercise scheduled for 2019.
 - Promote the council's online offer to increase our digital customer/resident base – see **Appendix B**. The investment in such marketing will be incorporated/explored in the council's emerging Digital Strategy (see 3.24).
 - Develop robust reporting tools to ensure decisions can be data driven and teams can react quickly to changes in customer behaviour/activity.
- 3.16 We have estimated there up to 107 additional processes that could be digitised. But we are not digitising processes merely for the sake of digitising. The Fit for the Future programme has initiated a series of reviews of systems/services and processes and our digitisation actions are prioritised on the basis of the recommendations emerging from these reviews. In making the decision as to whether or not to digitise processes, a full assessment based on cost of processing and volume of requests will be carried out to ensure that any investment of time/resources will deliver a benefit to the customer and organisation and represent good value:

| Area | Number of forms to digitise (resident customers) | | Number of forms to digitise (business customers) | |
|--|---|------------|---|------------|
| | Delivered | To deliver | Delivered | To deliver |
| Street scene, parks and car parks | 0 | 11 | 0 | 3 |
| Waste | 7 | 2 | 0 | 1 |
| Environmental health | 0 | 20 | 0 | 10 |
| Licensing | 0 | 6 | 0 | 36 |
| Housing | 0 | 1 | 0 | 0 |
| Planning and building control | 0 | 3 | 0 | 2 |
| Trees | 0 | 1 | 0 | 1 |
| Benefits, council tax and business rates | 13 | 0 | 2 | 2 |
| Complaints etc | 0 | 6 | 0 | 5 |
| | 20 | 50 | 2 | 57 |

- 3.17 The remaining processes that could be digitised span a number of line of business systems and it is likely that a series of integration projects will be required if we wish to fully integrate customer requests into line of business systems, replicating the success of the waste project. The processes, their back office systems and potential integrations are shown in a visual format at **Appendix C**.
- 3.18 The delivery of new digitised processes will be included in the Digital Roll-out plan (see 3.24) and in line with the Fit for the Future programme.

Key projects/decisions/hurdles

- 3.19 Our current challenges include the following:

| Project | Current status |
|--|--|
| Environmental health customer requests | <p>Ideally we want customers – or Connects on their behalf - to be able to raise a request through a Jadu form, create a record in their account, and for their request to pass into the IDOX line of business system to set up a 'job' for teams/officers to process. We are currently working with Jadu/IDOX on this integration work. The work is progressing slowly, but we have commitment from both partners to deliver this in Q1/Q2 of 2019. This is something that is important to many other councils and we have been working with Scottish Borders, Swindon and Northampton councils to demonstrate to the suppliers that this is worthy of their attention.</p> <p>Work on the integration is set to start in Q1 2019.</p> |
| Licensing - taxis | <p>We have purchased the IDOX back office system to support taxi licensing. The team is keen to digitise their processes as soon as possible and to encourage drivers/taxi operators to submit their applications online from April 2019.</p> <p>Due to the number of applications, the team are keen for applications to pass into the IDOX line of business system, with no need for manual inputting. Currently there is no integration between Jadu and the IDOX taxi licensing module and as such an alternative online forms solution provided by IDOX is being considered as part of an options appraisal. These forms will not look like the council website and there will be no integration into the Jadu customer account/CRM system. That said the forms will allow the team to provide a digital application process from April 2019, in line with the new policy, and will start to foster the culture change needed in the client base (taxi drivers and operators) to interact online.</p> <p>Officers are currently preparing an options appraisal ahead of making a</p> |

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| | decision as to whether the advantages of the alternative forms package outweigh the drawbacks. |
| Licensing – other licenses | <p>We have purchased the IDOX back office system to support other licenses (Licensing Act. Alcohol, TENs etc). The team is keen to digitise their processes as soon as possible. Currently there is no integration between Jadu and IDOX on licensing, however both Jadu and IDOX are keen to explore this as a possibility.</p> <p>At present, the council utilises a suite of partially digitised forms provided by the government to support Licensing Act responsibilities. While this may work for the customer, there is no integration with the council’s systems, so everything has to be re-entered or filed on paper. The government has also indicated that it may wish to discontinue their forms, because they do not meet Government Digital Standards (GDS).</p> <p>An options appraisal is currently underway to identify the best way to ensure an improved customer experience.</p> |
| Street scene/ grounds maintenance | <p>The street scene/ground maintenance teams currently do not have a dedicated line of business system – instead they rely on Lagan, which will be decommissioned in 2019. The current back office processes (supported by Lagan) are being rebuilt on Jadu and are set to be launched/tested later this year/early 2019.</p> <p>That said, the Jadu system is not designed to provide the sophistication of a dedicated back office system which could provide which could enable sophisticated mapping, scheduling and team management processes. As such, whilst the Jadu solution provides a robust system for submission of customer/requests and case management, the team is reviewing options for introducing a back office system, which could complement the Jadu solution and help to replicate the waste customer experience.</p> <p>An options appraisal is currently underway.</p> |
| Other projects/ assessments | <p>We are also assessing integrations and various line-of-business systems for trees, complaints FOIs etc. We are also intending to replace our website platform (content management system (CMS)) as the contract expires so that we can improve the customer experience particularly with regards to the search facility; and will be obtaining Microsoft Office 365 licences in May 2019 which will be used to improve the opportunities for collaboration amongst officers, Members and partners.</p> |

The Role of the Innovation Task Group

3.20 The Innovation Task Group includes Cllr A Yeates (chair), Cllr Mrs Evans, Cllr Mrs Barnett and Cllr Mrs Baker. When established it was supported by the then Cabinet Member, but it has not convened since it tested the revenues and benefits forms in late 2017. The task group’s objectives are as follows:

| Objectives | Desired outcomes |
|--|---|
| To scrutinise and support the council’s approach to encouraging channel shift and making best use of technology. | That the Strategic O&S Committee feels able to support the Cabinet Member in delivering innovation, channel shift and digitisation. |
| To view emerging proposals from the viewpoint of the resident and to help ensure that changes are user friendly. | That public facing systems are easy to use and improve the customer journey. |
| To consider/ensure where channel shift is encouraged that service provision is maintained – | That services to those that are not digitally able are protected and that they do not receive a diminution in service provision. |

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| even improved – for the most vulnerable and less digitally enabled, but also to consider how those customers who can interact on line can be encouraged/incentivised to do so. | That customers who are digitally able choose to interact with us online over and above any other channel. |
| To consider how members themselves can be persuaded to do more digitally. | That members embrace more council activity online. |
| To consider how the council will measure and realise efficiencies from the implementation of new systems. | Efficiencies are captured and incorporated clearly within the Medium Term Financial Strategy. |

3.21 The task group also identified it would focus its attentions on the following lines of enquiry:

- Supporting the development of the council’s approach to investing in technology that enables mobile and flexible working by employees and members.
- Helping to establish the requirements of the committee services system from the view of members and to help champion the implementation of any new system.
- To test, critique and endorse the customer experience in ordering a garden waste service.
- To ensure that the principles adopted to develop such an experience influence the future digitisation of other processes.
- To oversee the progress of the digitisation programme and to identify processes that may be added to the ‘wish list’ for development.

3.22 The task group was particularly helpful in testing, from a customer perspective, the new systems for garden waste and other waste processes and for revenues and benefits. Its work contributed to the significant success of the garden waste subscription service.

3.23 There is more work to be done now and it would be appreciated if the Innovation Task Group can meet to discuss how it can support the delivery of the digitisation programme with a particular view to ensure that the needs of residents and customers are considered appropriately.

The bigger picture – fitting into our overall Digital Strategy

3.24 In December 2018 Cabinet will consider the council’s proposed Digital Strategy. The strategy sets out our aims to:

- Increase the number of customers using our electronic services.
- Decrease the number of service failures that result in customer contact.
- To drive up mobility and flexible working within the workforce.
- Increase the level of organisational expertise in digital skills and our agility to respond to change.
- To simplify our network and limit the number of systems we use to reduce the ongoing costs.
- To use systems that permit flexibility to respond to service, organisation or legislative changes quickly.
- To ensure the availability of our information assets whilst ensuring their security and integrity.
- To challenge services to change and supporting them to transform.

The strategy details the delivery the infrastructure, culture change and skills to support our ambitions to digitise our services and deliver efficiencies and savings through the introduction of new technologies (hardware and software) that will support more agile, responsive and digital services. The projects listed in this document form part of the key activities to achieve the aims of the digital strategy and our strategic plan.

Identifying and delivering efficiencies and savings

- 3.25 Each of the 4 strategic projects currently being implemented were supported by a business case considered and approved by Cabinet. The business cases included an assessment of how digitisation will lead to cashable savings. Where defined cashable savings were included within the business case, these were incorporated within the MTFs at the time of approval. But we know that there is the potential for additional savings to materialise as development and implementation is completed.
- 3.26 It is not our intention to digitise processes as they are. Instead, there is a stage of 'As is' and 'To Be' process mapping which allows us to challenge how we do things, why we do things and agree new processes which are more streamlined and more customer friendly. When we do so, we find that there is potential for additional savings than originally envisaged.
- 3.27 Furthermore, when we go live, we may find that the public take-up is different to that forecast which brings with it the prospect of additional costs or savings.
- 3.26 The return on investment for digitisation can take some time to realise but elsewhere on this agenda there are examples of where additional cashable savings have been identified as a consequence of digitisation. So for instance, there are savings being proposed from garden waste (additional income and reduced administration costs), revenues and benefits (staff and postage / printing), and committee services (printing) which are additional to those first identified.
- 3.27 The working group is ensuring that it evaluates the impact that the new ways of working are having on the efficiency of the council and that savings – both cashable and non-cashable – are being realised by the relevant directors / heads of service – and will continue to seek a way in which savings can be identified and presented.

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| Alternative options | All developments are fully assessed through a robust business case. Approved business cases are predicated on an options appraisal that examines alternative means to achieve outcomes, the systems on the market, their costs and potential benefits, the customer experience and the ease of maintenance and development. |
| Financial implications | There are no financial implications arising specifically from this report. Any financial implications made in digitising processes have been considered as part of the business cases approved by Cabinet. |
| Consultation | <ul style="list-style-type: none"> • The digitisation programme is overseen by the working group which includes representatives from relevant service areas. Its programme is informed by the council's Fit for the Future board which reports to the council's Leadership Team. • Individual workstrands/projects are governed by separate working groups – for example the garden waste working group and the IDOX project board. Individual projects are led by the most relevant director or head of service. • In procuring systems, the team undertakes rigorous soft marketing testing by consulting with potential suppliers and their existing customers. In preparing tender documents and specifications we consult with neighbouring authorities to identify whether there are possibilities for joint procurement. • For instance, when we undertook the procurement for the single customer account, the specification was prepared in consultation with other councils including Tamworth, Stoke, Newcastle and Staffordshire and the procurement written in such a way that other councils could use our contract to buy from the successful bidder. For every additional council using our contract, the council is able to utilise additional development services from Jadu. • All significant procurements are taken to Cabinet for approval. • Customer testing, including with Members, is built into each project plan so that we can have confidence that the finished experience is user friendly. |

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| Contribution to the delivery of the Strategic Plan | <p>Lichfield District Council's Strategic Plan 2016 – 2020 sets out our ambition to become a council that is 'fit for the future'. This includes:</p> <ul style="list-style-type: none"> • Making our top services fully bookable online and so easy to use that people choose to go online as a first port of call. • Seeking out ways to increase productivity and efficiency through our Fit for the Future programme and service reviews. • We also highlight our ambitions to deliver good customer services and to develop innovative approaches to generate income. |
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| Equality, diversity and human rights implications | <ul style="list-style-type: none"> • The principles of the programme are designed around the customer. • It is acknowledged that whilst many residents / customers are digitally enabled and want will engage with the council online – the take-up of garden waste online is evidence of that – some people will not. • Implementing such systems will reduce the level of bureaucracy and will allow the council to release staff to support more vulnerable customers. • Appropriate system changes/new systems are tested with an Equality Impact Assessment to ensure that no individual, or group of people, is adversely affected. • Furthermore, customer testing is built into each project's plan so that the usability of the system can be reviewed from a customer's perspective. |
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| Crime & safety issues | <p>Implementation of these systems are governed by the appropriate security protocols and the protection of customers' data is paramount in the specifying of systems that we might wish to implement.</p> |
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| | Risk Description | How We Manage It | Severity of Risk (RYG) |
|---|---|---|------------------------|
| The programme and individual projects have comprehensive risk logs but key risks to the programme include: | | | |
| A | Ineffective programme governance | The programme is being delivered under the auspices of the Fit for the Future programme and it has its own programme working group and specific project boards. | Green |
| C | Insufficient capacity to support programme / projects | Where necessary business cases for individual projects include costs for additional capacity to manage and implement. Plans are being adjusted where capacity is limited. | Yellow |
| D | Failure to observe procurement laws | Where appropriate the council consults with the Procurement team at the county council | Green |
| E | Systems not properly costed | Procurement is predicated on lifetime costs of the system | Yellow |
| F | Systems not properly specified | A full specification is prepared for each system; which is tested against user expectations and we consult partners to identify best practice | Yellow |
| G | Benefits not realised | Each project has very clear measureable objectives and these are monitored and evaluated throughout the implementation | Yellow |

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| <p>Background documents</p> <p>Reports to Cabinet in July 2017; September 2017; October 2017 and February 2018 Report to Strategic (Overview and Scrutiny) Committee – November 2017.</p> |
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Appendix A Progress on strategic projects

| System | Progress | Outcomes | Next steps | Delivered? |
|---|--|--|---|------------|
| <p>1a) Replacement CRM and single customer account</p> | <p>A customer relationship management system (CRM) is a system that is used to store, track and manage data about customers (individual people), businesses or properties.</p> <p>It also contains a number of forms, so service requests can be raised on it and sent to teams. The service requests are raised against the property, person or business, so there is a record of all transactions/ interactions.</p> <p>CRMs can be linked into other systems such as online forms and back end systems – so that when a customer submits a request online/by phone, messages are sent direct from the CRM to the back end systems to request a job is delivered (e.g. missed bin). It can also be integrated with DMS systems to kick off more complex workflows.</p> <p>We historically had a customer relationship management system in place called Lagan/Verint which runs out of contract in 2019.</p> <p>As part of the digitisation programme we procured a new CRM lite from Jadu that is set to replace the Lagan fully by mid 2019. The CRM also provides an online customer account functionality and a suite of webform tools.</p> <p>The CRM lite was launched to support the roll out of garden waste charging (15 December 2017) and has been extended to support all waste processes across Tamworth and Lichfield. The processes integrate with systems that govern payments, waste services, property data and with our sticker printing supplier.</p> | <p>Our new CRM system has been rolled out across all existing Lagan waste services and is on target to replace remaining Lagan based services by mid-2019, in line with the contract end date.</p> | <p>It is anticipated that subject to further integrations it will be used to support a raft of other service areas.</p> <p>It is also set to support a range of services/requests that do not benefit from a line of business system including street scene and street trading.</p> | Delivered |
| <p>1b) Online sales process for garden waste</p> | <p>Following the decision to charge for garden waste from January 2018, a new system was required to support online, face to face and telephone sales.</p> <p>As part of the digitisation programme, the new Jadu CRM lite and on-line forms (see above) were utilised to support the garden waste charging. The systems integrate with the council's waste system (Bartec), payments system (Capita 360) and land and property data (SinglePoint).</p> <p>The system has since supported £1.5 million sales in Y1 (70% online take up) and has currently supported over 5,000 customers to purchase Y2 garden waste subscriptions. The system has also been used to support online processes including reporting missed bins, ordering additional bins, ordering bulky waste and scrap waste collections and more.</p> | <p>£1.5 million sales in Y1 garden sales (70% online take up).</p> <p>Strong online garden waste sales in Y2.</p> <p>Significantly lower than forecast admin costs</p> | <p>The missed bin process will be enhanced to deliver additional functionality.</p> | Delivered |

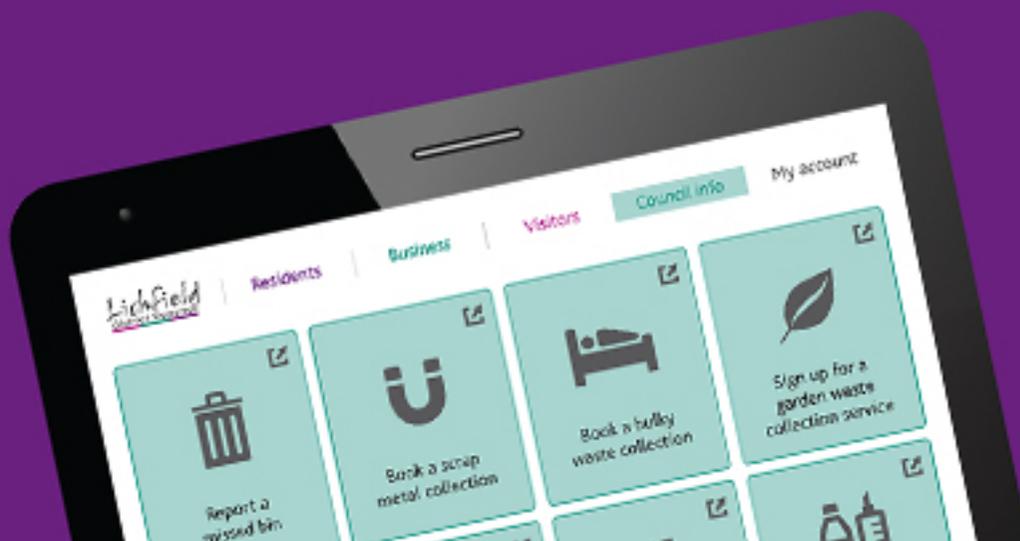
| System | Progress | Outcomes | Next steps | On target? |
|--|---|---|---|--|
| <p>2) Online forms for revenues & benefits (Northgate) and online forms</p> | <p>We identified a need to create a system that enables benefits applicants/those in receipt of benefits to apply for benefits, change their details etc. Due to the confidential nature of this information and the need for authentication, it is arguably key that a customer account forms part of the experience – so customers can login, keep track of their claims, supply supplementary information etc and the whole process doesn't have to go off line at some point.</p> <p>As part of the digitisation programme, we procured and implemented an online forms package from Northgate and commissioned online account integration work with Jadu, so that users can store their details in their online customer account. We secured £15000 from the LGA to part fund this work.</p> <p>Online processes launched to date include: address changes, application for single persons discount for council tax, housing benefit applications, council tax balance checks, direct debit payments registration and a landlords portal.</p> | <p>In total it is estimated the forms package could realise efficiencies on savings of approximately £136,000 over 3 years.</p> | <p>The team are working to integrate the forms into the Jadu single customer account, to reduce the need for customers to maintain two accounts with the council.</p> | <p>Online forms delivered</p> <p>Account integration underway</p> |
| <p>3) Line of business system for regulatory services and a document management system for development management /building control</p> | <p>There was no line of business system or document management system for regulatory services, including food inspections, licensing, pollution inspections, housing inspections, taxi licensing and more. Other service areas including ASB, housing, building control, licensing also did not have or needed improvements/enhancements to their line of business systems/document management solution.</p> <p>As part of the digitisation programme, the IDOX line of business system was procured for environmental health, housing, ASB, estates management, planning and building control and is now in various stages of implementation.</p> | <p>It is acknowledged that the implementation of a system for regulatory services will have the following benefits: easier compliance with GDPR, increased business continuity and resilience, improved data security, better workflow management, improved customer experience, better data management, reduced storage costs.</p> | <p>Fully implement the systems and deliver online processes where appropriate.</p> | <p>System procurement delivered</p> <p>Implementation underway</p> |

| System | Why? | Next steps | Expected outcomes | On target? |
|--|---|---|---|--|
| <p>4) Committee management system</p> | <p>There was no dedicated back office system in place to underpin the work of the democratic services team, which meant the council relied on the organisational skills and memory of individual officers to ensure documents are produced, edited, and retained appropriately. To achieve this they relied heavily on emails, rudimentary digital filing systems, and the chasing of colleagues to ensure statutory deadlines, and member and public expectations are met.</p> <p>As part of the digitisation programme, the democratic services team carried out a thorough options appraisal and selected Modern Gov to underpin the work of the team, teams across the council and also increase the digitisation of meetings.</p> <p>The project has been split into three phases.</p> <p>Phase 1 which has now been completed involved implementing the system to support the work of the democratic services team – including setting up report templates, getting to grips with the system, updating the website and setting up all the rules and processes for the production of meeting papers that will support the next phase. It has also seen clerks use the system at meetings to record attendance etc. Members have also started to use the mobile app during this phase.</p> | <p>Phase 2 (early 2019) will focus on rolling out the report production tools to officers across the council. This will require significant training and support from the democratic services team, so it is essential they fully understand the system.</p> <p>Phase 3 (from summer 2019) – the use of Mod Gov by officers and members will be standard and the printing of council papers will cease, other than for staff/members who have additional needs – large print etc.</p> | <p>By June 2019, all committee papers will be prepared using Modern Gov, meeting attendance will be recorded on Modern Gov and all council meetings will be digitised with the aid of the Modern Gov technology and app.</p> <p>This will translate into improved workflow processes, greater transparency, and enhanced member and customer experience</p> | <p>Phase one – delivered Phase two – underway Phase three – to be rolled out in May 2019</p> |
| <p>5) Online direct debits</p> | <p>An options appraisal was carried out on online direct debits for Y1 garden waste. It was determined that the benefits of the solution did not outweigh the costs and potential risks, and the tight delivery timeframe for garden waste charging did not support wider council wide investigation.</p> | | | <p>Not delivered – to be reconsidered in 2018/2019</p> |

Appendix B Our 'save time, go online' digital comms campaign

From signing up to paperless council tax bills to ordering a new bin, **save time, get online.**

www.lichfielddc.gov.uk/digitalservices



A low cost comms campaign that has included rollerboards, posters, social media posts and press releases has been launched in 2017 to encourage more residents to go online.

The campaign will be developed as part of the council's digital strategy to underpin the behaviour change the council wishes to encourage in residents, staff and members – to go online as a first port of call.

The timing of the campaign and the messaging will be vital to ensure that an adequate number of processes exist and that relevant account integrations support a positive user experience.

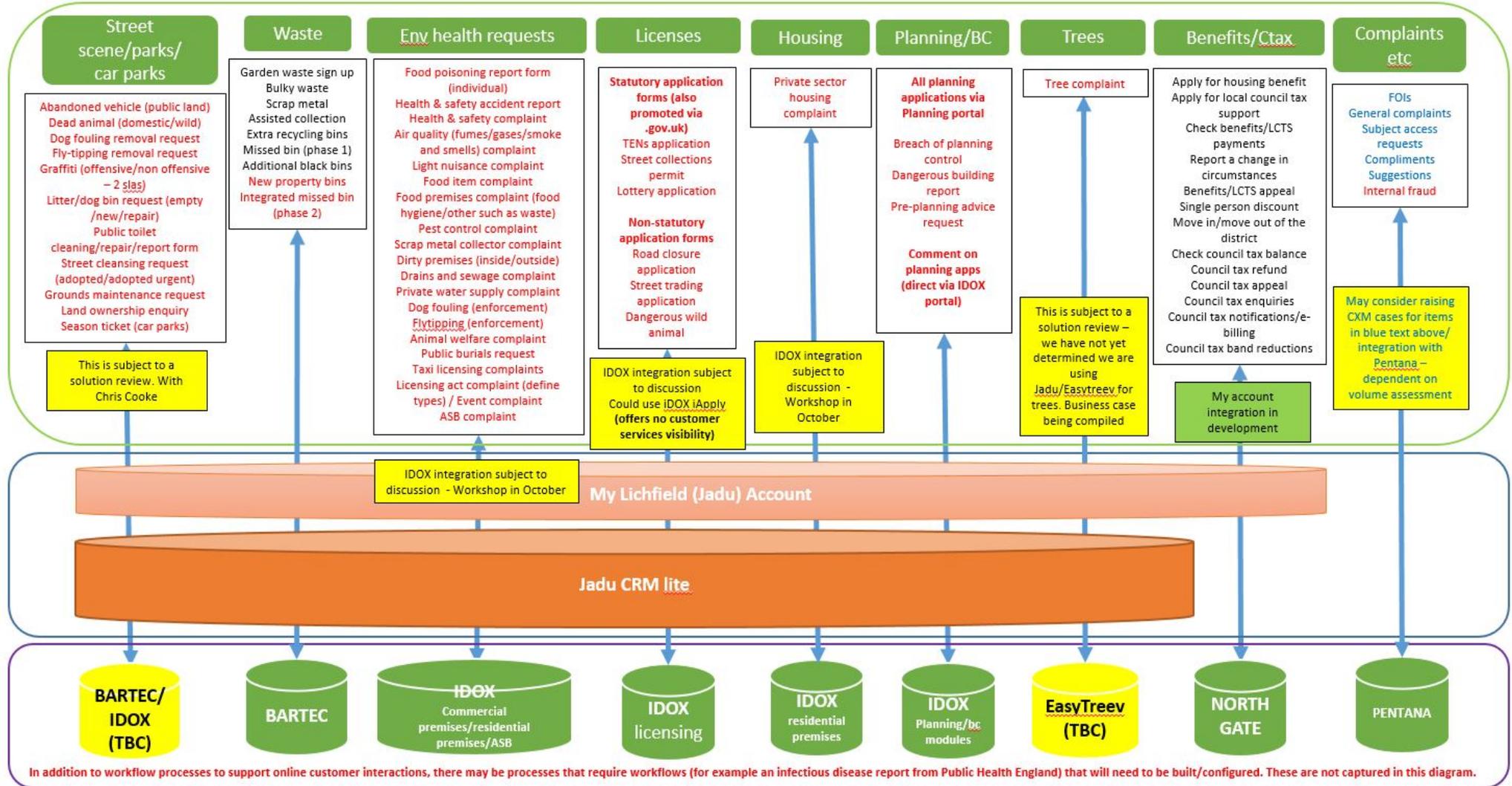
This will be explored and directed as part of the council's emerging Digital Strategy (see 3.24).

Appendix C Customer processes - residents

Key:
Delivered / To be developed

What systems support resident requests

Resident customer access systems map August 2018



Appendix C Customer processes - businesses

Key:
Delivered / To be developed

What systems support **business** requests

Business customer access systems map August 2018

