HIGHLAND COUNCIL

Date:	**28 November 2022**
Report Title:	**Redesign of Highland Council – Connected Customers and Digitisation Review**
Report By:	**Depute Chief Executive/ECO Performance and Governance**

1. Purpose/Executive Summary

1.1 At a meeting of the Redesign Board on 6 September 2022, it was agreed that a new area of work for the Redesign Board would be Connected Customers and Digitisation. This would consider how customers connect with the Council and, as an organisation, how we respond to our customers with a view to improving what we do.

This paper introduces the draft Project Brief for Connected Customers and Digitisation Project and seeks approval for this brief from the Board.

2. Recommendations

2.1 Members are asked to:

- Consider and agree the Project Brief for Connected Customers and Digitisation which can be found at Appendix 1.

3. Implications

3.1 **Resource:** A Project Manager has been appointed to this project from the Transformation Team. Officer resource from services across the organisation will be critical to the successful delivery. One of the key considerations of the project is whether additional investment will be required to improve our customer contact processes.

3.2 **Legal:** There are no direct legal implications arising from this report.

3.3 **Community (Equality, Poverty and Rural):** Whilst digitisation is an important element of the project, an inclusive approach will be one of the key principles and consideration of all Council customers and how they wish to contact the organisation. Engagement with our customers as part of this review will be critical to informing the direction of the project and will be a key consideration for the Project Board.

3.4 **Climate Change / Carbon Clever:** There are key opportunities to improve customer contact processes and as a result contribute to the Council's Net Zero targets.

3.5 **Risk:** Potential risks to the project are outlined within the Project Brief. All Redesign projects comply with Corporate and Transformation PMO standards in respect of proactive risk management and risks will be reviewed regularly by the Project Board.

3.6 **Gaelic:** There are no specific Gaelic implications arising from this report. The Council's Gaelic Language Plan is about to be refreshed in the light of the new National Gaelic Plan which may include a greater use of Gaelic when engaging with the public. All Redesign projects ensure the Council's bilingual policy is appropriately applied.

4. Connected Customers and Digitisation

4.1 At a meeting of the Redesign Board on 6 September 2022, it was agreed that a new area of work for the Redesign Board would be Connected Customers and Digitisation. This would consider how customers connect with and, as an organisation, how we respond to our customers with a view to improving what we do.

4.2 A Redesign Board workshop was held on 6 October 2022 to consider the scope and objectives of the project. Board discussions highlighted the importance of considering all the different ways in which customers connect with the Council and that it should include all services and departments across the organisation. It was noted that the review should also consider how different digital approaches could improve the customer experience, alongside how such approaches could provide greater efficiencies. In light of this, the review would support the operational delivery of the ICT and Digital Strategies agreed at Corporate Resources Committee in September this year.

4.3 A draft Project Brief to define the delivery of the project is included at appendix 1. This reflects the feedback from Redesign discussions and also two workshops, the first held with officers who will sit on the project Board and the second with the Members identified to be on this project Board.

4.4 It is proposed the overall purpose of the review is defined as follows:

- To review, improve and create a joined-up customer contact experience at the Highland Council, including the opportunities to further utilise digital approaches to support improved outcomes for our citizens, our staff and the Council. By developing the use of technology, resources are released to better support customers who need it the most.

- The project aims to put the citizen at the center of customer engagement at the Highland Council, to improve our process and approach for all contact methods (digital, telephony, face to face) and to provide a seamless customer experience.

- The project will consider not just initial customer contact but end-to-end service delivery, meaning it will look holistically at the processes that support the delivery of services initiated by customer contact.

- The outcomes of this data-driven and customer focused project will drive cost-saving efficiencies (financial benefits); reduce failure demand (greater efficiency); and increase internal/external customer satisfaction (improvement).

4.5 The Project Brief outlines the proposed purpose, scope, outcomes and objectives and approach for this project. As noted in the Redesign discussions and those subsequently held with project Board members, an iterative approach within continuous improvement is proposed to this project. Phase one, which will run until 31 March 2023, will focus on understanding and identifying areas for improvement based on existing data, learning from best practice elsewhere and considering requirements, particularly technological, that may be required to underpin improvements. Stakeholder engagement will be a core element of this phase of work. This initial work will support prioritisation for the next stage which will be agreed in conjunction with the Redesign Board.

5. Next Steps

5.1 The Redesign Board Members assigned to this Project are as follows:

Cllr Maxine Smith
Cllr Jackie Hendry
Cllr Bill Boyd

5.2 The Project Sponsor for this project will be the Depute Chief Executive/ECO Performance and Governance, recognising that this project is considering customer contact across the organisation. The Project Lead will be the Head of Community Support and Engagement and a Project Manager has been appointed.

5.3 A meeting of the Project Board is planned for December to agree the initial workplan.

Designation:	Depute Chief Executive/ECO Performance and Resources
Date:	18 November 2022
Authors:	Alison Clark, Head of Community Support and Engagement Hayley Airey, Project Manager
Appendix 1:	Project Brief: Connected Customers and Digitisation

Appendix 1 - Project Brief: Connected Customers and Digitisation

PROJECT BRIEF

Project	Connected Customers & Digitisation
Project Sponsor	Kate Lackie
Project Lead	Alison Clark
Date	28/11/22
Version	V1.2

The purpose of the Project Brief is to state **WHY** the work is important, **WHAT** needs to be achieved and by when, and **HOW** this will be achieved (including resources)

1 PURPOSE OF PROJECT

As agreed at the 07 September 2022 Redesign Board, this Project 'Connecting Customers & Digitisation' has been agreed to be included in the Redesign Board Programme.

This project is an opportunity to review, improve and create a joined-up customer contact experience at the Highland Council, including the opportunities to further utilise digital approaches to support improved outcomes for our citizens, our staff, and the Council. By developing the use of technology, resources are released to better support customers who need it the most.

This project aims to put the citizen at the center of customer engagement at the Highland Council, to improve our process and approach for all contact methods (digital, telephony, face to face) and to provide a seamless customer experience. This is not only limited to initial customer contact but the end-to-end service delivery meaning we look holistically at the processes that support the delivery of services initiated by customer contact.

This project acknowledges communication is a two-way process, and endeavors to avoid unnecessary repeat contacts by ensuring alignment with customer needs.

The outcomes of this data-driven and customer focused project will drive cost-saving efficiencies (financial benefits); reduce failure demand (greater efficiency); and increase internal/external customer satisfaction (improvement).

2 SCOPE OF THE PROJECT

Scope of the Project All services are included within the scope of the project, but this is subject to prioritisation as the project progresses.

Data and research will be used to understand the Highland Council's priority improvement areas, taking cognisance of financial and operational challenges. This will include consideration of a single 'front-door' for customers to access services central information and communication process.

All customer contact methods are in scope and subject to prioritisation:

- o Face to Face
  - Service points
  - Frontline service delivery

- o Telephony
  - Omni (i.e. integrated / not separate channels)
  - Inform review of telephony systems
- o Digital
  - Review of existing methods and consideration of new methods including options for a single point of entry
  - Review customer experience (including self-help options) and consider measuring customer satisfaction
  - Developing a system that delivers quality business intelligence (e.g. consider the centralising of information)
  - Development of MyAccount to personalise web content to the user
  - Improved use and connecting of key data sets (people, property, place) to provide a more connected customer experience
  - Website design and functionality including search
  - Chatbot and instant messaging
  - Electronic forms with integration in back-office applications, supporting improved data flow and automation

Key areas for consideration are:

- How do services wish to connect with their customers in this digital age, taking cognisance of the significant financial challenges?
- How do customers want to connect with the Council?
- How do Services respond to contact?

3 EXPECTED OUTCOMES & OBJECTIVES

This project will be prioritised in a phased / staged process where outcomes and objectives develop through the evidence-base and feasibility of options.

The first 'scoping' phase of the project will focus on user-led, data-driven, evidence-based research.

Objective: Data and Research will be used to understand the Highland Council's:

- Priority areas
- Customer need & demand
- Business problems & opportunities
- Requirements to deliver improvements, including resources (e.g. people, finance)

Data and Research Output:

- A review of customer 'demand management' (planning & forecasting)
- Assessment and definition of business requirements:
  - Production of a customer contact / strategy
  - Mapping the customer journey
  - Defined future target operating model(s)
  - Customer 'use cases' (customer interaction within a system)
- Key data sets within our Line Of Business Applications that enable the Council to know its customers
- Best practice in other organisations
- Improvement plan based on prioritisation of need
- Identification of service failure

Longer-term **Outcomes** include:

Improved Customer Journey / Experience Outcomes

- Improved Customer Journey/Experience through ability for customers to self-serve or service center to process their request at first point of contact (supported by defined business process).
- Customer centered process: optimising customer journey and availability of required information sources.
- Streamlining processes resulting in service improvement.
- Reduced waste & duplication by designing detailed business process that enables resolution at first point of contact.
- Increased customer satisfaction.

Improved Performance

- Increased service efficiency and delivery.
- Staff wellbeing through reduced volumes of complaints and general enquiries being passed to back office/operational staff and lower value tasks being technology enabled

Financial & Sustainable
- Improved use of resources (e.g. staffing).
- Support the delivery of the related savings.
- Supporting / contributing to NetZero.

4 APPROACH

Key Principles of the Project Approach:

Citizen is at the heart	Customisation vs configuration (Define requirements)
Data-led	Evidence-based
Openness	Proportionate
Codify	Collaboration
Customer and staff education and training	Consistency & reliability
Agile (iterative / work in rapid small chunks)	Inclusive
One Council approach	Customer satisfaction
Digital by Desire	End-to-end customer journey

Project planning:

In recognition of the complexities and interdependencies of the Project, the aim is to phase the work, where targets and priorities are set based on the ongoing learning. This will be done in conjunction with the Redesign Board.

Quick wins will be delivered as and when identified, in line with overall direction of travel. This will ensure that there is significant opportunity to seize early benefits and to build momentum.

<u>Staged Approach:</u>

Phase 1 – 31ˢᵗ March 23	Understanding & Identifying areas for improvement
	Stakeholder engagement
	Identifying technology required to underpin improvements
	Identify resource requirement in line with planned work/timescales
Phase 2 – Est. Nov 23	Examining individual processes
	Delivering quick wins
	Preparation required for digital improvement
Phase 3	Delivering prioritised Projects and Improvement Interventions

The following sets out the main methods to be applied for the effective management and successful delivery of the Project – application will be appropriate to the specific work being undertaken, always with a focus on delivering against the stated project objectives.

<u>Management & Delivery</u>

A proportionate Project Managed approach will be applied for control and ongoing viability for the duration of the work. Key aspects of this approach will include the following (not exhaustive):

- **Governance** (Sponsor, Lead, Redesign Board, etc.)

- **Project Brief/Project Initiation Documentation** (this document, i.e., what the Project must address and achieve, how it will be conducted, how it will be resourced, etc.)

- **Project Plan** (task list, dates, responsibilities in line with achieving stated Outcomes and Objectives)

- **Work Packages** (i.e., allocation of work across the Project in line with achieving stated Outcomes and Objectives)

- **Benefits Management** (i.e., being clear on what is expected, and measure the extent this is delivered)

- **Communication Management**

- **Risk Management**

- **Project Assurance**

- **Implementation and Change Management**

<u>Stakeholder Engagement</u>

- Customers

- Community including Community Councils

- Members

- Staff

- Trade Unions

- Others as identified throughout the Project

- Consider methods of engagement, including focus groups.

Review of Existing Processes

- Website

- Telephony system – Omni Channel (End to end)

- Quick wins

Collate Current Data Held

- Business intelligence

Research

- Define best practice
- Research other local authorities and other organisations
- Consider configuration versus customisation
- Consider My Account approach
- Benchmarking (inc. other Local Authorities e.g. Manchester & Manchester Digital Strategy)

- Digital Office (Scotland)

- The Improvement Service
- Literature review
- Analyse existing survey data

Strategic Alignment

- Digital Strategy, ICT, Business Intelligence Vision, Information & Data Strategy, Financial Strategy.
- Aligned to Service Plans.

Business Requirements

- Target operating models – what work are we commissioning?
- Consider piloting and testing evidence-based digital process solutions.

Process Improvement - "LEAN" Approach

- **DEFINE** the problem / opportunity - includes scope and provides focus

- **MEASURE** and quantify what is going on – evidence and research, avoiding assumptions, accounting for the "voice of the customer"

- **ANALYSE** the evidence, determine root causes, research solutions

- **IMPROVE** by designing solutions, with business justification to ensure viable / sustainable

- **CONTROL** the improvements through establishing change into business as usual, realising benefits, and ensuring revised / new measures are in place

5 INTERDEPENDENCIES

Related and/or dependent work/projects in respect of this Project
- Asset Management

- Roads

- Community Engagement Portal

- Existing Digital Improvement Projects

- Re-procurement of Telephony System

- New Ways of Working

6 TIMESCALES

The following sets out the initial key milestones and estimated dates:

Milestone	Target Date (Finish)
Redesign Board approved Project Brief	28/11/22
Project Board First Meeting	Mid-Dec
Phase 1: Understanding, identifying & defining areas for improvement	31/03/23
Phase 2: Examining individual processes, delivering quick wins & preparation required for digital improvement	30/11/23
Phase 3+: Delivering prioritised Projects and Improvement Interventions	Ongoing
Phase 4: Implementation	Ongoing

7 RESOURCES

The following sets out the groups that will draw on the resource committed and aligned to the Project:

PROJECT BOARD

- **Purpose**
  - Take decisions to maintain pace and momentum, including remedial action to assure timeous project delivery
  - Be forward looking, and proactively monitor and oversee the delivery of the expected outcomes and benefits
  - Identify risks and issues that could lead to non-achievement of outcomes and benefits and make decisions on the required remedial action
  - Promote and recognise the progress, achievements, and the people delivering the projects objectives

- **Membership**

Role	Service
Sponsor	Performance & Governance Depute Chief Exec
Lead/Senior User	Communities & Place (Contact & Engagement)
Senior User	Communities & Place (Revenues & Customer Services)

Role	Service
Senior Supplier	Depute Chief Exec (ICT)
Senior Supplier	Property & Housing (Housing)
Senior Supplier	Infrastructure Environment & Economy (Planning)
Senior Supplier	Infrastructure Environment & Economy (Roads)
Senior Supplier	Communities & Place (Waste)
Senior Supplier	Health & Social Care
Senior Supplier	Education & Learning
Redesign Board Member	Councillor
Redesign Board Member	Councillor
Redesign Board Member	Councillor
Project Manager	Depute Chief Exec (Transformation)
Project Assurance (Project Management)	Depute Chief Exec (Transformation)
Project Assurance	Corporate Audit Manager (Corporate Audit)

PROJECT TEAM

- **Purpose**
  - provide direct input to the project work areas to deliver the stated objectives of the overall project
  - work to the direction of the Project Board
  - via the Project Manager, reporting progress, achievements, risk and issues to the Project Board

- **Membership**

Role	Service
ICT Transformation Manager (Delivery)	Depute Chief Exec (ICT)
Transformation Manager (Solutions)	Depute Chief Exec (ICT)
FOI & Data Protection Manager	Performance & Governance (Data/Information)
Service Lead – Housing Policy & Performance	Property & Housing
ICT Senior Solutions Analyst	Depute Chief Exec (ICT)
Principle Engineer	Infrastructure Environment & Economy (Roads)
Customer Service Operations Manager	Communities & Place (Contact & Engagement)
Service Centre Team Leader	Communities & Place (Contact & Engagement)
Customer Resolution & Improvement Manager	Communities & Place (Contact & Engagement)
Customer Service Delivery Manager	Communities & Place (Contact & Engagement)
Principle Policy Officer	Communities & Place (Contact & Engagement)
Project Manager	Depute Chief Exec (Transformation)
Principle Waste Management Officer	Waste Management

8 RISKS

The following are identified as the key risks associated with the project together with mitigation and management actions – the Project will continually identify and assess risk as a key process in the management of the work, and delivery of expected benefits

Risk	Impact (High/Medium/Low)	Mitigation & Management Action
Significant risk of scope creep, due to the iterative developing process, where project planning, scope and objectives are in development.	**High**	Short planning. Research and data are crucial to the prioritisation, and Project Board to review plans and targets resulting from phase 1. Business case development, with vision outlined.
Managing expectations of the project deliverables and outcomes.	**High**	Communication Strategy. Plan a tailored communication approach. Short planning. Regular board meetings. Regular highlight reports.
Focus on technology may lead to solutions that do not meet the business requirements	**High**	Focus on business problems that look at people, process and then technology. Significant engagement with ICT to understand the potential capabilities of current business applications, as well as the planned upgrades. Research and identify Customer Experience platforms used in other local authorities and organisations across the UK.
Alienation of current core / frequent customers.	**High**	Customer profiles need to be established. Communication Strategy. Stakeholder Engagement Strategy & Plan. Plan a tailored communication approach. Education approach and requirements. As customers will be used to specific contact methods, an iterative / phased change model may need to be considered for certain contact methods. Any proposed change will need to be evaluated in terms of risk/return.

Resource implications of implementing any new / updated technology	**High**	Training requirements of new / updated technology roll outs will need to be scoped and costed as part of the options appraisal. Detailed options appraisal to understand requirements. Data cleansing and validation required prior to any roll out of new systems/technology. Regular Board meetings.
Feasibility of existing systems in place to efficiently optimize the customer journey e.g. omni (integrated channel) contact methods.	**Medium**	Collaborate and engage with ICT regarding the capabilities of current applications and systems. Taking a business case led approach based on the defined business problems, opportunities and outcomes. Engage with stakeholders regarding the current customer journey and processes. Engage with stakeholders to establish what an optimized customer journey would look like and work with ICT, conduct a feasibility study.
Resource implications of delivering project alongside service delivery	**Medium**	Organisational and service buy-in. Regular Board meetings. Communication Strategy. Plan a tailored communication approach.
Data protection and security issues not recognised as significant early enough and become delaying factors later in the project.	**Medium**	Identify the need for data protection impact assessments of different activities throughout the project and ensure that these are reported to the Board.