Agenda Item	7
Report No	RDB-04-23

HIGHLAND COUNCIL

Committee:	**Redesign Board**
Date:	**30 March 2023**
Report Title:	**My Council Project Update**
Report By:	**Chief Executive**

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. The Redesign Board held on 28th November 2022 approved the Project Brief. The Project Board on 19th December 2022 agreed a change of project name to 'My Council'.

1.2   The Project approach is data-led and the aim is to focus on the areas of significant impact. This report, agreed by the Project Board on 16/03/23, provides the Redesign Board with an update on the project progress during Phase 1: December 2022 to 31st March 2023 and seeks approval for the proposed approach for phase 2 of the My Council project.

2.   Recommendations

2.1   The Redesign Board are asked to:
- Note the update on the work completed during phase 1 (detailed in appendix 1 and 2) and the outcomes from the Board workshop on 7 March 2023;
- Consider and agree the draft Customer Contact Vision detailed at appendix 3;
- Consider and agree the proposed workstreams for phase 2 of the My Council Project as set out at section 8;
- Note that should the proposed Phase 2 workstreams be agreed, the detailed workplan, including resourcing requirements and baseline measurements, will be presented to the next Redesign Board for approval.

3. Implications

3.1 Resource
A Project Manager has been appointed to this project from the Transformation Team and additional resource from the Transformation team has supported phase 1 of the project. Officer time from across services has also supported phase 1.

As previously reported to the Board, additional resource will be required to implement phase 2 of the project and progress individual workstreams. As part of the Budget setting meeting on 2 March 2023, the Council agreed to allocate £0.5m investment to take forward the My Council project. The proposed allocation of this will be subject to a future report to the My Council and Redesign Boards.

This is a project which impacts upon all services across the organisation and aims to fundamentally shift the approach to customer contact. All services are therefore involved in the development and implementation of the My Council project and this in turn will have resource implications on services across the organisation.

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

3.3 Community (Equality, Poverty and Rural)
The focus on the customer and the differing needs of customers, is central to this project. Whilst digitisation is an important element of the project, an inclusive approach is 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.   My Council Project Overview

4.1   The purpose of the Project is to review 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 self-service digital options for those who can use it, resources are released to better support customers who need it the most.

4.2   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.

4.3   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).

4.4   Phase one of the project, which ends on 31 March 2023, has focused on understanding and identifying areas for improvement based on existing data, learning from best practice elsewhere, stakeholder engagement and considering requirements, particularly technological, that may be required to underpin improvements.

4.5   This initial work has supported prioritisation for the next phase to be agreed as part of this report.

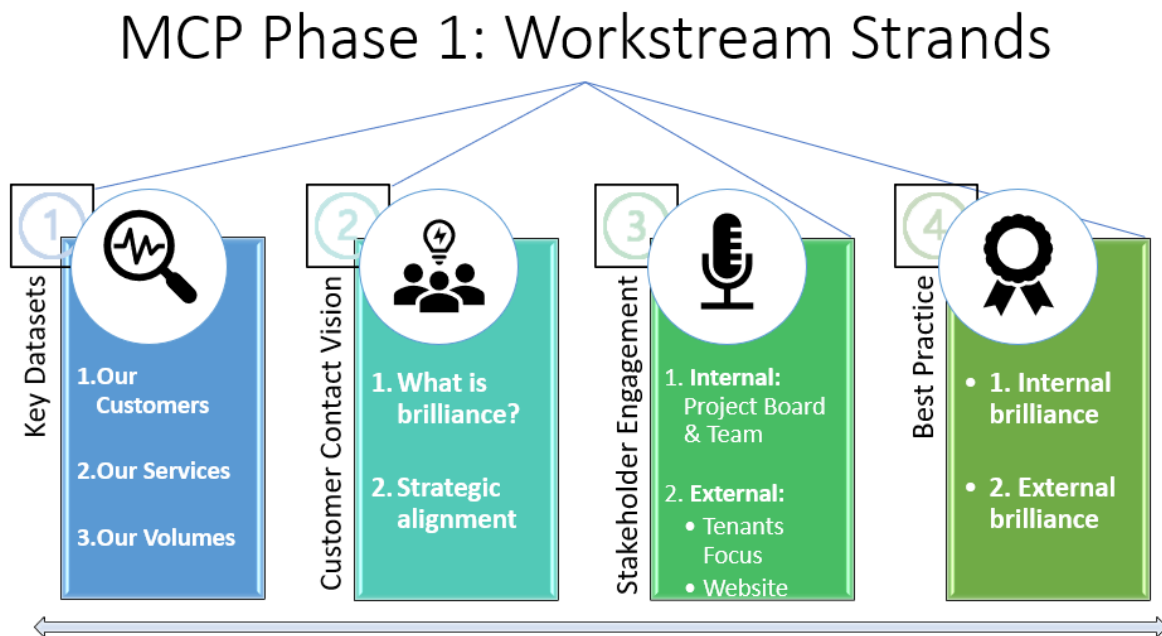4.6   *My Council Project Phases (Project Brief)*
Phase 1 – 31st March 23   Understanding & Identifying areas for improvement
Stakeholder engagement
Identifying technology required to underpin improvements
Identify resource requirement in line with planned work/timescales

Phase 2 – Est. Nov 23   Examining individual processes
Delivering quick wins
Preparation required for digital   improvement

Phase 3   Delivering prioritised Projects and Improvement Interventions

5.   My Council: Phase 1

5.1   The My Council Project Board met on 19/12/23 and agreed the following activities for phase 1:

  1. A review of customer 'demand management' (planning & forecasting)

2. Assessment and definition of business requirements:
3. Production of a customer contact vision
4. Identification and review of key data sets within our Line of Business Applications that enable the Council to know its customers
5. Best practice in other organisations
6. Improvement plan based on prioritisation of need (Phase 2)
7. Identification of service failure (agreed to be taken forward following phase 1 activity)

5.2 These areas of work resulted in four workstreams as outlined in the diagram below: Key Datasets, Customer Contact Vision, Stakeholder Engagement, and Best Practice. Phase 1 Highlights along with key activities within the four workstreams are detailed in **Appendix 1 and 2** and a short summary of each is provided below.

MCP Phase 1: Workstream Strands

Key Datasets
1. Our Customers
2. Our Services
3. Our Volumes

Customer Contact Vision
1. What is brilliance?
2. Strategic alignment

Stakeholder Engagement
1. Internal: Project Board & Team
2. External:
   • Tenants Focus
   • Website

Best Practice
• 1. Internal brilliance
• 2. External brilliance

Key Project Phase 1 Milestones are attached in **Appendix 2**.

5.3 *Key Datasets* - The Key Data Sets workstream purpose was to identify what data/information the Highland Council has about customer contact across all communication channels, what that contact is about and how the Highland Council performed. These findings were presented to the Board Workshop on 7 March 2023. The workstream output will ensure the design of Phase 2 will be data driven and benchmark information will be available to measure the benefits accrued.

5.4 *Customer Contact Vision* - The Customer Contact Vision workstream was to identify what brilliant customer service looks like and to develop a Customer Contact Vision statement for the Highland Council. This will form the foundation of the future Customer Contact Strategy which will be taken forward in phase 2. We listened to

our internal and external customer and acknowledge that while there are some areas of excellent customer service within The Highland Council, to truly deliver the standard we aspire to will require transformational change. The draft Customer Contact Vision is attached in **Appendix 2**.

5.5   *Stakeholder Engagement -* The Stakeholder Engagement workstream purpose was to undertake consultation with both internal (Project Board and team members) and external (tenants/customers) parties along with developing and implementing an online survey on performance which remains open. This ensures the project understands citizen requirements and needs and will continue throughout phase 2 process.

5.6   *Best Practice -* The Best Practice workstream has undertaken a review of best practice in customer care within the Highland Council as well as within external organisations. This ensures the project is learning from a wide range of internal and external exemplars.

6.   My Council Project: Key Research Trends

6.1   Across the four Phase 1 workstreams of Key Datasets, Customer Contact Vision, Stakeholder Engagement and Best Practice, four key trends emerged.

6.2   *Key Learning from trends & high-level data includes:*

Open Doors & Access Points; this key trend highlighted the many different customer contact entry points and in particular the large variety of different telephone numbers and email addresses.

Data & Reporting; this key trend highlighted the difficulties in ascertaining a single version of the truth due to different data sources, different systems, and different levels of data quality.

Our Volumes; this key trend highlighted the significant volume of contact and the partial picture of the overview. Analysis highlighted key areas including the website traffic and use, Service Centre telephony volumes, Service Points and CRM data. Learning included understanding the answer to the "top 10" reasons for customer contact is dependent on the category of contact.

Changing Customer Behaviour; this key trend highlighted the changes seen at a customer, societal and Council level. This includes understanding changing expectations and the need to clarify responses times. Learning included customer interactions with different contact methods and understand the general trend to self-serving and digital options whilst avoiding digital exclusion.

6.3   The four key trends were presented to Project Board & Team at the workshop on 07/03/23 and the following area explored:
1. An understanding of key research context & trends
2. Defining the Customer Contact Problem(s)
3. Identifying opportunities - Prioritise work for Phase 2

6.4   Amongst the 30 attendees, there was strong consensus on what the research and data were indicating. Participants were then asked to consider from the research trends presented, the key business problems and challenges.

7.   My Council Project: Workshop 07/03/23 Outcomes

7.1   The workshop focused on identifying business problems associated with customer contact, based upon the evidence collected during Phase 1. Multiple business problems were identified, many of which interlinked and there was consistency in the issues identified across the different workshop groups.

7.2   Four business problems were identified to explore further:
1. Too many 'virtual' front doors (web, telephone, email)
2. Disjointed customer journey & business intelligence
3. Mismatch with expected resolution times/standards & what is / can be delivered
4. Need for up-to-date accurate website content and information

7.3   It is important to note that the business problems identified are essentially the symptoms of wider causes within the organisation and it is these root causes which require to be identified and tackled. As with all business problems, it is crucial to develop business solutions that consider people, process and technology. Accordingly, the workshop involved identifying **opportunities and**

solutions to the problems identified. Whilst different business problems had been identified, analysis has demonstrated there are significant overlap of the proposed opportunities, solutions, and quick wins.

7.4   Key themes included:
- Reviewing the Council's website – in terms of information available and services available through this route
- Improving the customer journey to enable timely updates and feedback on requests for both the customer, members, and staff
- Updating our telephony offering to use new technology to manage calls
- Managing customer expectations through developing key service standards across different service offerings
- Alignment between front and back-office customer processes
- Reviewing the routes into the organisation to provide a more efficient and streamlined offering to customers
- Considering alternative digital mechanisms for engagement

7.5   Post-workshop consolidation of the generated opportunities, solutions & quick wins has led to the development of emerging priority workstreams that broadly contain all of the proposed solutions generated by participants at the workshop.

8.   Proposed Next Steps - Phase 2 Workstreams (01/04/23 to 30/11/23)

8.1   Analysis of the workshop outcomes has concluded that there are 4 proposed workstreams for the My Council Programme Phase 2 (1/04/23 to 30/11/23):
1. **Customer Contact Strategy** – setting out the Council's proposed approach to Customer Contact in the future, the methods, approaches and expectations internally and externally
2. **Data-led and Customer Informed (Business Intelligence)** – ensuring that our customer contact improvements are data-led and informed by customer feedback
3. **End to End Customer Journey** – ensuring the customer has sight of their requests throughout the contact process
4. **Customer Contact Methods (Online: Website / CRM & Telephony)** – developing our contact offering to improving digital and self-service mechanisms and improving access to timely information through our web offering

8.2   Within each workstream, it is proposed there are three potential levels of work:
- Deliver quick wins – immediate changes to affect positive change
- Address operational challenges
- Deliver strategic / transformational change

8.3   The detail of each proposed workstream is outlined in the following pages.
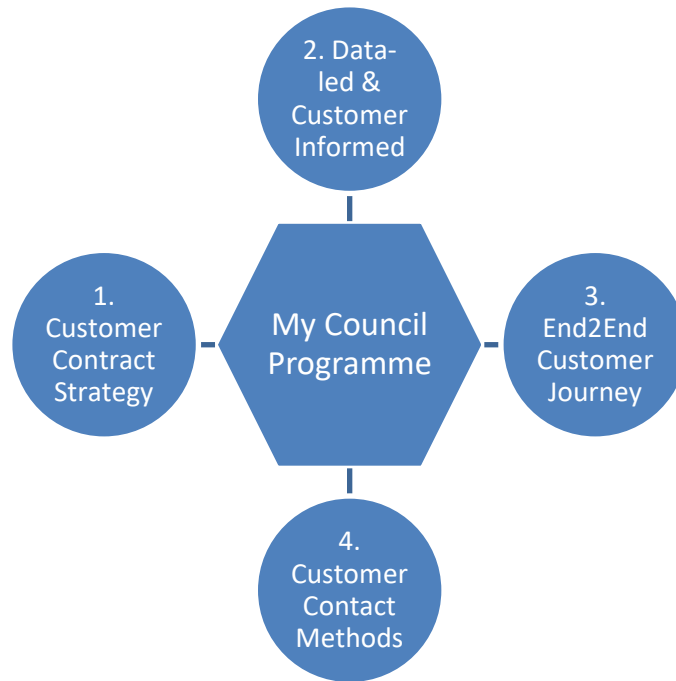
8.4   **1. Customer Contact Strategy Workstream**

Phase 2 <u>Proposed Deliverable:</u>
Production of THC Customer Contact Strategy
   The Customer Contact Strategy will:
   • Support and deliver against the Customer Contact Vision (Phase 1)
   • Align with other associated strategies, such as the Council's Programme, Corporate Plan, Business Intelligence Strategy and Digital Strategy
   • Manage customer expectations – be honest about what is reasonable to expect
   • Integrate accessibility & prevent digital exclusion
   • Consider internal Service Standards
   • Support self-serve
   • Learn from internal best practice
   • Assessment of the use of social media

8.5   **2. Data-led & Customer Informed (Business Intelligence) Workstream**

<u>Data-led & Customer Informed **Phase 2** Proposed Deliverables:</u>
   • Strategic cohesive and enhanced view of the customer
      a. Identify core customer data sets and map the business processes around them
      b. Identify core reporting requirements in line with business needs

<u>Workstream Principles & Workshop generated Opportunities:</u>

- Address one of the core business outcomes around not having a cohesive view of our customers and customer contact that we can report on, drive and insight & change
- Links to Council strategies for Information & Data Management, and to the vision for Business Intelligence
- Data stewardship and information asset owners
- Develop organisational capability around data, role of data and information to provide Business Intelligence and take forward the respective strategies

Baseline Measures will include different business intelligence methods for comparison before/after implemented actions.

8.6   ## 3. End to End Customer Journey (E2ECJ) Workstream

E2ECJ **Phase 2** Proposed Deliverables:
To improve the end-to-end customer journey through taking a test of change approach and focus on an area of high customer demand: Review of Housing Contact

E2ECJ Workstream Principles & Workshop generated Opportunities:
- Optimise self-serving / direct to best channel
- Maximise capabilities of existing technology (e.g. SP, CRM, new portals)
- Enable efficient processes & systems (by being data-led)
- Enable customer updates and progress tracking
- CRM review (prioritisation of events, explore customer characterisation & profiles)
- Stakeholder engagement & user testing

E2ECJ will establish a set of Baseline Measures that will include contact volumes for Housing. Baseline measures will ensure the ability to compare before / after implemented actions.

8.7   ## 4. Customer Contact Methods Workstream

Our customers interact with the Council over three distinct channels, online, over the phone and in person. Each channel is currently underpinned by a single Customer Relationship Management (CRM) system. The desire is to provide the same experience for our customers irrespective of the contact channel they chose.

The outcome of this workstream is to provide a single source of truth for all contacts which can be used as the foundation for business intelligence.

Optimisation activities would include defining customer interaction reasons, channels, and a catalogue of public services and products offered by the Council. This approach ensures we have a consistent approach across all channels of interaction and provides the base needed to aid and inform the development of the CRM system and the business intelligence platform.

Taking forward this work there are three key strands:

      i. **Website**
     ii. **CRM**
    iii. **Telephony**

i. Website

Phase 2 Proposed Deliverables:

Strategic Review of The Highland Council Website focusing on Help and Information

- Development of the online customer offering
- Review of underpinning Content Management System
- Web content review and development
- Strategic approach to ongoing support and development of online customer offering i.e. static help and information pages
    - Staff resources, structure, function & place in the organisation
    - Organisational approach to content governance and authoring ensuring content is accurate and published in line with best practice

Quick wins

- Address, implement & test user feedback lowest rated information pages
- Review Format of the 'Contact Us' page & test re-formatting
- Audit of web content by age with findings published to Service owners to action as required
- Review and prioritisation of the top 10 customer information categories searched

Workstream Principles & Workshop generated Opportunities:

- Promote service proactive publication
- Incorporate accessibility requirements and features
- Full review of website content
- Produce continuous improvement plan
- Enhancing the existing approach to the online offering is the initial priority but this is to be followed by understanding options for additional automation

Baseline Measures will include different business intelligence methods that will include call volumes data and user feedback for comparison before/after implemented actions (correlation).

ii. CRM

Strategic Review of CRM Application and Web forms
- Development of customer interaction categories
- Scope and define public services and products
- Review possibilities of Telephony integration for automatic customer interaction logging
- Review automation possibilities to back-office systems
- Review data extraction/integration possibilities for business intelligence
- Underpinning components
  a. CRM Application
  b. Online Forms and processes
  c. My Account customer authentication

Quick wins
- Address, implement & test user feedback lowest rated website forms
- Comparison of top 10 customer contact data across calls, service points and web to identify tactical improvements to the customer experience

Workstream Principles & Workshop generated Opportunities:
- Payment's system modernisation

Baseline Measures will include different business intelligence methods that will include call volumes data and user feedback for comparison before/after implemented actions (correlation).

ii. Telephony

Telephony **Phase 2** Proposed Deliverables:
- Strategic review of telephony & contact
  - Contact Centre
  - Card payments over the phone
  - Corporate telephony
- Quick Wins
  - Assess existing customer journey through Service Centre IVR & call routing, internal hunt groups to identity opportunities for short term improvement
  - Comparison of top 10 customer contact data across calls, service point and web to identify tactical improvements to the customer experience

Workstream Principles & Workshop generated Opportunities:
- Making it easier for the customer – e.g reducing the number of phone numbers – one Council, one Number? (Tied to review of Contact Us Web Review)
- Availability of service staff to receive customer contact calls when required

- Explore technological options to improve contact experience e.g. call back
- Understand technologies and prerequisites for use, e.g chat bots and links to accuracy of underpinning data such as web content.
- Enhancing the existing approach to telephony is the initial priority but this is to be followed by understanding options for additional automation

Baseline Measures will include different business intelligence methods that will include call volumes data and user feedback for comparison before/after implemented actions

<u>Key Risk</u>
- Resource availability – Stakeholder engagement is required across respective Service functions to understand available resources to support the workstreams and senior stakeholder commitment to resourcing the work required to take the MY Council Programme Forward.

9.   Next Steps

9.1   Communication and engagement is a key strand that will underpin the work of the My Council project throughout its various stages. It is intended that a sub-group of the My Council Board, including the Chief Executive, Head of Community Support, Contact and Engagement and the Communications Manager, will lead this work going forward.

9.2   The sub-group will consider how to utilise different forms of engagement to target feedback from customer groups and the wider public across Highland, to inform the My Council Project on an ongoing basis. This group will also consider the different potential mechanisms to ensure that customer feedback and the associated learning from this, is a fundamental part of our approach to Customer Contact as we move forward. This reflects the proposed vision outlined in appendix 1. This will also align with other corporate approaches to engagement, such as the monthly blogs on key themes.

9.3   Considering the significant complexity of the identified workstreams required for the future, is recommended that the My Council project be managed going forward as a programme, with a set of interconnected projects. The four projects are outlined above. Oversight would remain with the My Council and Redesign Boards but reflects the complexity but also the inter-relatedness of the different workstreams.

9.4   Should the proposed workstreams be approved, it is intended to develop detailed workplans for each setting out the timescales, deliverables and baseline measures. This will include quantifying the resources required to take-forwards these projects. Approval for drawing down from the £0.5m to support this work will be required from the Redesign Board.

Designation: Chief Executive

Authors: Hayley Airey, Project Manager
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Date: 17-3-23

My Council Project: Phase 1 Highlights

Constraint	Status	Summary Narrative

Time
Cost
Quality
Scope
Risk
Benefits
	On track	Phase 1 has achieved the required objectives.
		
		There were a significant number of activities to be undertaken in phase 1 (End of March 2023). This required resource attention, as highlighted at the 19/12/22 Project Board.
		
		As outlined within the Project Brief, and approved by the Project Board on 19/12/22 the following activities were undertaken in Phase 1:
		
		1. A review of customer 'demand management' (planning & forecasting)
		2. Assessment and definition of business requirements:
		   A. Production of a customer contact vision
		3. Identification and review of key data sets within our Line of Business Applications that enable the Council to know its customers
		4. Best practice in other organisations
		5. Improvement plan based on prioritisation of need (Phase 2)
		6. Identification of service failure
		As directed by the Project Board on 19/12/23 the following activities outlined in the Project Brief were to be actioned within Phase 2:
		1. Assessment and definition of business requirements:
		   B. Mapping the customer journey
		   C. Defined future target operating model(s)
		   D. Customer 'use cases' (customer interaction within a system)
		The report outlines the proposed recommendations for Phase 2.

My Council Project: Phase 1 Workstream Key Highlights

Key Datasets workstream: Review of customer demand management:	Planned Target Date	Status No significant progress Some Slippage On track Completed 🔴🟡🟢🟣	RAG 🔴🟡🟢🟣	Notes
Identify data/information about customer contact across all communication channels	07/03/23	Completed	🟣	Key findings from key data sets within our Line of Business Applications (that enable the Council to know its customers) were presented to the workshop 07/03/23
Establish the reasons for customer contact	07/03/23	Completed	🟣	Presented to the workshop 07/03/23
Establish the Highland Council's performance in relation to customer contact	07/03/23	Completed	🟣	Identification of service failure difficult to establish due to lack of end-to-end process oversight. Significant % of repeat calls are from internal hunt groups Presented to the workshop 07/03/23

Customer Contact Workstream: Production of a customer contact vision	Planned Target Date	Status No significant progress Some Slippage On track Completed 🔴🟡🟢🟣	RAG 🔴🟡🟢🟣	Notes
Workshop Customer Brilliance with internal customers	January 23	Completed	🟣	Key questions were: • What does brilliance look like for customer contact? • How did services wish to connect with their customers? • What resources were anticipated to progress the project
Review information and findings from the other three workstreams	March 23	Completed	🟣	Findings were reviewed to understand external customers wishes and behaviours and best practice within other local government organisations.

Draft customer vision statement produced for oversight by the project board	March 23	Completed	🟣	Customer Contact Vision included in Appendix 3.

Stakeholder Engagement Workstream	Planned Target Date	Status No significant progress 🔴 Some Slippage 🟡 On track 🟢 Completed 🟣	RAG	Notes
All customers identified	Feb 23	Completed	🟣	Complete breakdown of internal and external customers agreed by the working group
Selected customers to engage with and method	Feb 23	Some slippage	🟣	• Internal customers engaged with at the 1st Workshop on 30th January • Web customers invited to complete an online questionnaire • A questionnaire is running within the Service Centre • Focus group conducted with a group of housing tenants
Questions for online questionnaire agreed and survey launched	March 23	Completed	🟣	Early findings from the questionnaire were included in the 2nd workshop presentation and Customer Contact Vision
Interviews conducted with housing tenants'	Feb 23	Completed		Feedback from customers was included in the 2nd workshop presentation and Customer Contact Vision

Best Practice Workstream:	Planned Target Date	Status	RAG 🔴 🟡	Notes

Best practice in other organisations			🟢⬤	
Interviewed High Peak and Staffordshire Moorlands Council Alliance	Dec 2022	**Completed**	⬤	Conversation focus: Developing a Customer Contact Vision.
Interview Fife Council	Feb 23	**Completed**	⬤	Conversation focus: Customer Contact Transformation. Change Managers Network has also asked their network to make connections with THC.
Attended Customer Service Manager Conference	Feb 23	**Completed**	⬤	Case studies from Edinburgh and Enfield Council. Edinburgh speaker has advised Project they would be interested in continuing the conversation.
Production of a working definition of "Our customers".	March 23	**Completed**	⬤	Project Team produced based on best practice exemplars

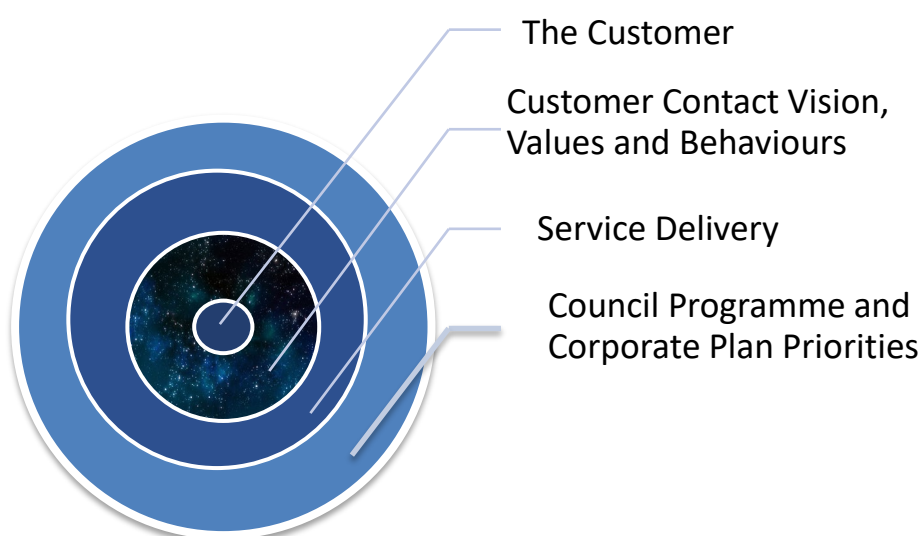**My Council Project: Phase 1 Timeline (Key Milestones)**

- 28th November 2022   Redesign Board (Project Brief approved)

- 19th December 2022   Project Board (Phase 1 Outline Plan & Key Deliverables)
- 9th January 2023   4 Project workstreams launched

- 30th January 2023   Project Board & Team Workshop Focus:
  - What does brilliance look like for customer contact?
  - How do Services want to connect with customers?
  - Anticipated resources to progress this project?
- 23rd February 2023   Scottish Local Authority Customer Service Conference

- 23rd February 2023   Focus group held with Highland Council tenants

- 7th March 2023   Project Board & Team Workshop Focus:
  - Understanding key research trends across workstreams
  - What are the business problems?
  - What are the opportunities?

- 16th March 2023   Project Board (Phase 2 Outline & Key Deliverables)

- 30th March 2023   Redesign Board

Highland Council Customer Contact Vision
Achieving Customer Excellence

Our Commitment to Our Communities
We are committed to ensuring all of our customers can access the services and information they need through the route that best suits their needs. We will offer an inclusive customer-focused end to end service, ensuring that the customer is at the heart of what we deliver.

Our customers are anyone who needs or chooses to interact with us. This includes residents, businesses, visitors, partners, community groups, Councillors and our own staff.

The Customer

Customer Contact Vision, Values and Behaviours

Service Delivery

Council Programme and Corporate Plan Priorities

Our Principles and Values for Customer Contact

We will ensure that:
- Our contact methods are simple and clear to enable customers to get the service they require through the best route for them
- A range of methods are available for contacting The Highland Council so we are accessible for everyone
- We improve our digital offering so that customers can conduct transactions, access the services and information they need quickly and at a time that suits their needs
- Our customers receive a complete service from point of request to service response and are kept updated on their requests and queries
- Our staff are approachable, responsive and customer focused
- We will be honest and transparent about what we can do but also what we cannot
- We will develop clear service standards to ensure that all customers know what they can expect when they request a service or information from the Council
- We will report performance against our customer contact standards and use this to improve what we do
- We will listen to the experience of our customers, learn from this and use this to improve what we do