

	<h2>Policy & Resources</h2> <h3>16 May 2017</h3>
Title	Customer Transformation Programme: Phases 2-4
Report of	Interim Chief Operating Officer
Wards	All
Status	Public
Urgent	No
Key	No
Enclosures	Appendix A – Screenshots of the new My Account service Appendix B – Screenshots of new Adult social care web pages Appendix C – Customer Transformation Programme Business Case and Approach
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Summary

This report presents the progress and expected outputs of the first phase of the Customer Transformation Programme, and seeks approval to proceed to implement the remainder of the programme, as part of the council's agreed Customer Access Strategy (CAS).

In October 2016, Policy and Resources Committee approved capital funding of £1.5m to fund Phase 1 of the programme, and noted the £5.4m full cost of the two-year programme.

Phase 1 is on track to deliver all intended outputs, and significantly improve the experience that residents have when they use the online customer account within the council's website. The Customer Transformation Programme as a whole will enable a shift to greater website self-service by customers, improve efficiency and reduce demand on the council.

This report presents an update on the programme's progress and the technical assurance received, and seeks approval to commit the balance of the anticipated programme funding, in order to deliver the programme in full.

Recommendations

That the Committee:

1. Notes the progress updates provided in this report on the delivery of the Customer Transformation Programme, as part of the Council's Customer Access Strategy (found here: [Customer Access Strategy](#))
2. Notes the assurance achieved for the technical elements of the programme to date, and endorses the continuation of the technical assurance approach.
3. Notes the additional capital requirement of £3.9m required to complete the Customer Transformation Programme. This will be considered as part of the Business Planning report and brought back to this Committee for approval in June 2017.
4. Subject to approval of the additional capital requirement, delegates authority to the Interim Chief Operating Officer, in consultation with the Chairman of the Policy & Resources Committee, to enter into contracts on a phase by phase basis to deliver the programme, with payment contingent on successful delivery against milestones.

1. WHY THIS REPORT IS NEEDED

- 1.1. In October 2016, Policy and Resources Committee approved capital funding of £1.5m to fund Phase 1 of the programme to implement the recommendations of the Customer Access Strategy, and noted the overall anticipated costs for the programme of £5.4m over a two-year period.
- 1.2. This report provides an update on Phase 1 and seeks approval to proceed with implementing the full programme defined in Appendix C by committing the balance of the anticipated programme funding.
- 1.3. Obtaining this approval in advance of the targeted Phase 1 go-live of July 2017 will ensure continuity of the delivery team, to maintain momentum and a smooth continuation into subsequent phases, and allow the programme to stay on track with its overall timescale.

2. IMPLEMENTING THE CUSTOMER ACCESS STRATEGY

- 2.1. The Customer Transformation Programme was established to implement the Customer Access Strategy. The vision of the Customer Access Strategy is that by 2020 customer access will be simplified and primarily 'digital by default', offering efficient resolution and services joined-up across the council, partner agencies and the community sector.
- 2.2. The Customer Transformation programme is an enabler for improved demand management within the council, allowing the council to encourage those who can self-serve to do so, while maintaining services for those who are unable to interact digitally. This acts as an enabler for the savings identified in the Council's MTFS.
- 2.3. The programme is delivering through four streams of work, as follows:

1. Refresh the Council's web navigation and content to make it more relevant to residents
2. Deliver more online transactions, that integrate with the council's internal databases and processes
3. Address Digital Inclusion both to help residents work with the council online, and to help them use the Internet in their daily lives
4. Improve services and drive digital take-up doing more to encourage low cost channels (web) in preference to traditional (face to face and telephone)

- 2.4. The full detail of this programme is found in Appendix C.

UPDATE ON PHASE 1 OUTPUTS

- 2.5. Phase 1 has progressed well and is due to complete in July 2017. It will deliver a new and improved My Account service, and a range of new online services and features to make the online experience much better for our residents. These improvements include the following:
 - 2.5.1. We know that remembering multiple complex account passwords is a challenge, so from July, customers will have the option to log in to their account using their existing social media accounts. People typically use their social media accounts several times a week, so it is a much easier way to access the account, and no less secure.
 - 2.5.2. There will be improved form-filling experiences for non-collected bins, new bins, residents who need special collection arrangements, and the reporting of environmental problems.
 - 2.5.3. There will be a brand new form for customers to request, book and pay for bulky waste to be removed, fully integrated into the council's systems, replacing the current inefficient manual processes.
 - 2.5.4. Customers will be able to save forms and return to them at a later point. They will also be able to see a record of all forms they have submitted through the new account.
 - 2.5.5. There will be a brand new 'web chat' service so that customers can get instant help with their online experience from a customer agent, whilst they are in the middle of it, rather than having to send a separate email or make a phone call.
 - 2.5.6. For the first time, customer services agents will be able to set up a new account on behalf of customers who need assistance.
 - 2.5.7. Customers without an account will be offered an easy way to create one after they've filled in a new online form, saving them the trouble of entering their details again.
 - 2.5.8. Customers will receive one case reference number per case, which will be used consistently, rather than several different reference numbers as happens with some requests now.
 - 2.5.9. Residents will be able to tell the Council how they would like to be kept up-to-date on requests or cases they log
 - 2.5.10. Customers will be able to tell us what services they are most interested in, and this will mean they see any available news about these services when they log in, as well as updates via email when they come available.

- 2.5.11. Council staff will be given the ability to edit content and create new forms easily and quickly without specialist IT help
- 2.6. As well as improvements, the new My Account will continue to offer the features that are available with the current service, such as:
 - 2.6.1. A list of cases raised by customers with their status, so that customers can see whether they are open, closed, or in progress. The programme team are also working with the services to ensure status updates visible to customers are more timely and meaningful than currently.
 - 2.6.2. Email acknowledgements of all submitted cases, containing a full copy of the form submitted
 - 2.6.3. Customers having control of their personal data held in the council's customer services system; they can update their name and contact details at any point
 - 2.6.4. The ability to sign up to a council email newsletter.
 - 2.6.5. The ability to view and use the account via smaller screens on mobile devices
- 2.7. And the new service has laid the foundations for the following improvements to be introduced in phase 2 and beyond:
 - 2.7.1. Adding the remaining suite of services currently offered online (Parking Permits, Libraries, Council tax, and Housing Benefits), and making improvements to these forms so that they are more user friendly
 - 2.7.2. Adding in brand new online services for Barnet Homes customers and Adult Social Care customers, fully integrated with the back office systems
- 2.8. In phase 1 the Programme has also included:
 - 2.8.1. Work to list and prioritise improvements required to the website, including research with residents into the success factors for online reporting, and
 - 2.8.2. The development of an outline business case for rationalising the council's contact centres
- 2.9. The re-designed carer's pages of the website are included in Appendix B, demonstrating the difference that is made by taking the views and experiences of users as the starting point for web improvement. The project held 7 design sessions in 6 weeks – 1 in NLBP with social care and health professionals, 6 at sites used by carers.

- 2.10. This user-led approach will be continued throughout the programme as part of the website improvement workstream. The programme team has compiled a list of user stories that describe the most common and important reasons that people come to council's website, and these will be explored in detail with groups of residents, taking one topic at a time. These user research sessions will be held regularly to test out website improvements on a specific topic as they are designed, and also once they have gone live on the website, to enable ongoing iterative improvement.

ASSURANCE MECHANISMS IN PLACE

- 2.11. Payments for this programme are made on successful achievement of milestones. Almost 50% of payment for the technical solution is held back until satisfactory completion of testing by the council.
- 2.12. The Council's independent technical assurance partner Leidos reviewed and gave the council assurance for the plan for phase 1, prior to working beginning earlier this year. Leidos has also reviewed and given assurance for further technical documents as they have become available. This has provided the council with the necessary external expertise to be confident that the delivery approach is appropriate and that the technical plans are robust.
- 2.13. Dependencies on existing systems and on the Council's IT estate have been assessed and are being managed through the programme board.
- 2.14. The implementation of the CAS is aligned with the Council's ICT Strategy. The review by the Council's technical assurance partner queried a number of elements of this alignment and have confirmed compliance. These reviews are continuing as new technical documentation is developed by the programme.
- 2.15. User research has been completed with a group of residents, to find out what makes a good experience for them when they are completing forms online. This research identified specific recommendations for improved usability, which are being taken into account for the new service. Some points made were:
- 2.15.1. Improve the process by which users select addresses
 - 2.15.2. To use clear explanatory text in support of online forms, and to avoid council jargon. For example - "My bin has not been collected" is better than "Report a missed bin"
 - 2.15.3. Avoid repetitive questions
 - 2.15.4. Make it clear when a question is mandatory, and only mandate information (such as "near to" on a pothole report) where absolutely necessary

2.15.5. Registration for an account should be an option, rather than compulsory, and should offer a clear resident benefit

3. REASONS FOR RECOMMENDATIONS

- 3.1. The recommendation enables the Council to continue delivering against the council's vision for customer services for 2020 as expressed in the Customer Access Strategy and the business case for the Customer Transformation Programme.
- 3.2. The work is designed to address three key drivers for the council:
 - 3.2.1. Improve customer service, interacting with residents the way they expect now, and will increasingly expect in the future (improving routine transactions like reporting a pothole or applying for a parking permit)
 - 3.2.2. Reduce failure demand, by giving feedback, by getting things right first time online, without need for further more costly contact
 - 3.2.3. Enable future demand management, now, for routine transactions. Setting the council up to increasingly do more complex transactions (Housing, cusp of care) online in the future.
- 3.3. The approval to continue with the next stage of the customer transformation programme is required in May 2017, in advance of Phase 1 go live, in order to ensure continuity of the delivery team and to maintain momentum with a smooth continuation into subsequent phases.

4. POST DECISION IMPLEMENTATION

- 4.1. A two-year implementation programme is envisaged, which commenced in February 2017.
- 4.2. Following approval, the programme team will be able to:
 - 4.2.1. Develop the detailed plan for phase 2 and refine the high level plan for phases 3 and 4. See Appendix C, pages 63 to 66, for the original scope and phasing.
 - 4.2.2. Recruit a project manager to set up and deliver the digital inclusion programme

5. IMPLICATIONS OF DECISION

Corporate Priorities and Performance

- 5.1. Barnet's vision for 2020 in the Corporate Plan is to have redesigned local services that are integrated, intuitive and efficient, making life simpler for our residents and customers. This proposal sets out to implement the changes identified in the Customer Access Strategy to achieve this vision.

Resources (Finance & Value for Money, Procurement, Staffing, IT, Property)

- 5.2. Following the initial allocation of £1.5m for the first phase of the work, this report calls for the remaining balance (£3.9m) of the £5.4 million financial investment. This will be considered as part of the Business Planning report to this Committee in June.
- 5.3. The programme will be contracted for and funded phase by phase, based on experience and success of previous phases, and payments will be made on completion of milestones (following the practice adopted for Phase 1). This ensures that there is absolutely clarity about what will be delivered, and payments are conditional on reaching specified milestones.

Social Value

- 5.4. The proposals outlined in this report seek to ensure that accessing the council's services is a more efficient and effective experience, that services are more transparent and accountable to the customer, that more information and services are available online so that customers can access them at a time of their choosing, and that barriers preventing customers accessing online channels are addressed through a Digital Inclusion Strategy.

Legal and Constitutional References

- 5.5. Due to the nature of the changes proposed, a full Equality Impact Assessment and public consultation was completed on the Customer Access Strategy in 2016.
- 5.6. The proposals in the Customer Access Strategy are compliant with the legislative frameworks governing the services covered in the Customer Access Strategy. Where legislation mandates face to face access for clients or customers, this will be provided.
- 5.7. Council Constitution, Responsibility for Functions, Annex A, sets out the terms of reference of the Policy and Resources Committee including:
'To be responsible for the overall strategic direction of the Council including customer care, communications and resident engagement activities.'

Equalities and Diversity

- 5.8. An Equalities Impact Assessment was completed and updated with the outcome of the public consultation. It concluded that the combined changes

proposed by the strategy will not detrimentally impact customers with protected characteristics.

- 5.9. Understanding and mitigating the impacts of all changes on customers is an ongoing responsibility that will be undertaken throughout the implementation of the Customer Access Strategy.
- 5.10. The strategy recognises that there is a section of the community for whom face to face and telephone channels will continue to be needed and certain services where face to face access is required to achieve the optimum outcome. The proposed changes will not exclude any customer from accessing a service they need.
- 5.11. In addition, a key aim of the strategy is to redirect valuable staff resources to where they are most needed, supporting residents who have more complex needs. Given the need to make savings, it is vital that we design out unnecessary interactions and automate transactional services as much as possible.
- 5.12. The strategy seeks to support customers less able or confident using the website or other self-service options through assisted self-service and through the Digital Inclusion work.

Consultation and Engagement

- 5.13. The Consultation report for the Customer Access Strategy was presented and approved in June 2016.
- 5.14. The programme has created a detailed engagement plan and has delivered initial engagements, including resident user research and a member's update.

Insight

- 5.15. The new IT solutions will strengthen the breadth of data available to understand how customers are making use of the new online tools.
- 5.16. User research will be a continuous part of the programme's implementation.

6. BACKGROUND PAPERS

- 6.1. Policy and Resources Committee, 5th October, 2016
[Policy and Resources paper: Customer Transformation Programme](#)
[Appendix A: Business Case Document](#)
[Appendix B: Digital Inclusion Strategy](#)
[Appendix C: EIA](#)
- 6.2. Policy and Resources Committee, 28th June, 2016
[Agenda and Minutes: Policy and Resources Committee](#)
[Appendix 1 – The Draft Customer Access Strategy](#)

[Appendix 2 - EIA](#)

[Appendix 3 - Public Consultation Feedback](#)

- 6.3. Policy and Resources Committee, 16th December 2015
[Agenda and Minutes: Policy and Resources Committee](#)
[Customer Access Strategy](#)
[Appendix 1 - The Draft Customer Access Strategy](#)
[Appendix 2 - Equality Impact Assessment](#)

Appendix A – Screenshots of the new service

BARNET
LONDON BOROUGH

Bulky or additional waste collection Your Unique reference code **BAR2151** Save

- Terms and conditions
- Items for collection**
- Your details
- Book a collection
- Payment
- Review and submit

Items for collection

** Required*

I am a *

resident
 business/landlord

Please select the type of item(s) to be collected *

White goods and electrical items
 Other non electrical household items
 Additional wheeled bin collection

Select electrical or white goods item *

Freezer

Add item

Calculate total

Collection total

£ 45.75

Back Save Next

BARNET
LONDON BOROUGH

Bulky or additional waste collection Your Unique reference code **BAR2151** Save

- Terms and conditions
- Items for collection
- Your details
- Book a collection**
- Payment
- Review and submit

Book a collection

** Required*

Please note that collections for non electrical, electrical and white goods, additional bins may run to different schedules and as such we may not be able to collect all items on the same date.

Is the collection from your home address? *

Yes
 No

Get available collection dates

Select your electrical or white goods item collection day

Friday, April 14, 2017

Back Save Next

Appendix B – Screenshots of new Adult social care web pages

Figure 1. Previous carers pages

The screenshot shows the 'Carers in Barnet' page. The header includes the Barnet London Borough logo, a search bar, and links for 'Log in or Register' and 'Select Language'. The breadcrumb trail is 'Home > Our services > Adult social care >'. The left sidebar lists 'Adult social care' with sub-items: 'Carers in Barnet' (highlighted), 'Carers assessment', 'Emergency plan for carers', 'Carers support', 'Health and leisure for carers', and 'Care Act'. The main content area features the title 'Carers in Barnet', a definition of a carer, a list of reasons for needing care (age, illness, disability, mental health, substance misuse), and the 'Barnet Carers Centre' section. The centre section provides information on support services and lists partner organizations: Age UK Barnet, Barnet Mencap, Alzheimers Society in Barnet, Friend in Need, Jewish Care, and Caring for carers. It also mentions services for young carers.

The screenshot shows the 'Carers support' page. The header and breadcrumb trail are identical to the previous page. The left sidebar highlights 'Carers support'. The main content area features the title 'Carers support', a description of the Carers Support Offer, and a list of support types: information, advice, and advocacy; training; the Emergency Plan Scheme; health and wellbeing support; emotional support; social activities; financial support; and information on how to access breaks from caring. The 'Carer breaks' section explains that breaks are important tools for supporting carers and lists ways to access them following a carers assessment.

Figure 2. New carers landing page

The screenshot shows the top navigation bar with the Barnet London Borough logo, a search bar, and links for 'Log in or Register' and 'Select Language'. Below the navigation bar are three buttons: 'Adult Social Care Home Page', 'Social Care Connect', and 'Barnet Community Directory'. The main content area starts with a breadcrumb trail: 'You are here: Home > Our services > Adult social care >'. The primary heading is 'I am a carer, family member or friend', followed by a definition of a carer. A blue box highlights the 'Barnet Carers Centre' with the text 'Did you know? You can access information, advice, emotional and practical support from Barnet Carers Centre.' Below this, a light green box offers 'I want to know what's available to me as a carer' with a 'Get support' button. An image of a woman and an elderly man sitting at a table is positioned to the right of this section.

This screenshot shows the lower portion of the landing page. It features three distinct service options, each with a heading, a brief description, and a call-to-action button. The first option is 'I want to connect with other carers and support groups', which includes an image of three people at a table and a 'Getting out and about' button. The second option is 'I want to know more about my rights as a carer', featuring an image of an elderly couple and a 'Your rights' button. The third option is 'I want to find out about equipment to help me and the person I care for', with an image of a woman in a wheelchair and an 'Equipment and adaptations' button. The top navigation bar and breadcrumb trail are consistent with the previous screenshot.

Appendix C – Customer Transformation Programme Business Case and Approach

Policy and Resources Committee, 5th October, 2016 - [Appendix A: Business Case Document](#)

