

Scrutiny Standing Panel Agenda



ICT and E-Government Scrutiny Standing Panel Monday, 8th August, 2005

Place: Committee Room 2

Time: 7.30 pm

Democratic Services Officer: S G Hill - Senior Democratic Services Officer
Tel: 01992 564249 Email: shill@eppingforestdc.gov.uk

Members:

Councillors F Maclaine (Chairman), M Cohen (Vice-Chairman), S Barnes, Mrs D Borton, M Colling, Mrs D Collins, T Farr, P McMillan, Mrs P K Rush and Mrs M Sartin

<p>PLEASE NOTE THAT THIS MEETING IS OPEN TO ALL MEMBERS TO ATTEND</p>
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1. APOLOGIES FOR ABSENCE

2. SUBSTITUTE MEMBERS (COUNCIL MINUTE 39 - 23.7.02)

(Head of Research and Democratic Services) To report the appointment of any substitute members for the meeting.

3. DECLARATION OF INTERESTS

(Head of Research and Democratic Services). To declare interests in any items on the agenda.

In considering whether to declare a personal or a prejudicial interest under the Code of Conduct, Overview & Scrutiny members are asked pay particular attention to paragraph 11 of the Code in addition to the more familiar requirements.

This requires the declaration of a personal and prejudicial interest in any matter before an OS Committee which relates to a decision of or action by another Committee or Sub Committee of the Council, a Joint Committee or Joint Sub Committee in which the Council is involved and of which the Councillor is also a member.

Paragraph 11 does not refer to Cabinet decisions or attendance at an OS meeting purely for the purpose of answering questions or providing information on such a

matter.

4. TERMS OF REFERENCE / WORK PROGRAMME (Pages 3 - 4)

(Chairman/Lead Officer) The Overview and Scrutiny Committee has agreed the Terms of Reference of this Panel and associated Work Programme. This is attached. The Panel are asked at each meeting to review both documents.

5. CORPORATE CONTACT CENTRE - SCOPING STUDY REPORT (Pages 5 - 110)

(Portfolio Holder for ICT and Corporate Support Services/A Scott – Head of ICT and Communications) To consider the attached report.

6. REPORTS TO BE MADE TO THE NEXT MEETING OF THE OVERVIEW AND SCRUTINY COMMITTEE

To consider which reports are ready to be submitted to the Overview and Scrutiny Committee at its next meeting.

7. FUTURE MEETINGS

To consider the forward programme of meeting dates for the Panel.

TERMS OF REFERENCE - STANDING PANEL

Title: e-Government and Information & Communications Technology (ICT)		
Status: Standing Panel		
Terms of Reference:		
<p>(1) To consider how the implementation of the ODPM Implementing e-Government (IEG) Priority Outcomes and the local e-Government Strategy should be monitored and prioritised and to make any resulting recommendations to the ICT and Support Services Portfolio Holder or Cabinet as appropriate.</p> <p style="padding-left: 40px;">a) To consider within this theme options for Member connectivity to the Council's new Committee Management System. This relates to Priority outcomes R5, R6 and R22.</p> <p>(2) To consider the introduction of a Corporate Customer Contact Centre on behalf of the ICT and Support Services Portfolio Holder and to make any resulting recommendations to the ICT and Support Services Portfolio Holder or Cabinet as appropriate.</p> <p style="padding-left: 40px;">a) To consider the specific ICT role within the Corporate Customer Contact Centre and agree which elements of this project should be monitored and reviewed by other O&S panels/committee</p> <p>(3) To consider the Council's IEG Government Returns on behalf of the ICT and Support Services Portfolio Holder prior to consideration by Cabinet.</p> <p>(4) To review the Council's ICT Strategy on behalf of the Overview and Scrutiny Committee, ICT and Support Services Portfolio Holder and Head of ICT and to make any resulting recommendations to the ICT and Support Services Portfolio Holder or Cabinet as appropriate.</p> <p>(5) To monitor progress on the Council's ICT Service Business Action Plan on a six monthly basis.</p> <p>(6) To consider the introduction of the Re-use of Public Sector Information Regulations 2005 on behalf of the ICT and Support Services Portfolio Holder prior to consideration by Cabinet.</p> <p>(7) To report to the Overview and Scrutiny Committee, the Council and the Cabinet with recommendations on matters allocated to the Panel.</p>		
Work Programme 2005/6		
Item	Priority	Report Deadline
<ol style="list-style-type: none"> 1. Review of the Council's IEG Strategy 2. Introduction of a Customer Contact Centre 3. ICT Strategy Review 4. Re-use of Public Sector Information Regulations 	<p>High</p> <p>High</p> <p>High</p> <p>Medium</p>	<p>September 2005</p> <p>September 2005</p> <p>October 2005</p> <p>February 2006</p>
Chairman: Councillor F Maclaine		

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Report to E-Government and ICT Standing Panel

Date of meeting: 8 August 2005

Portfolios: ICT and Corporate Support Services

Subject: Corporate Customer Contact Centre – Scoping Study Report

Officer contact for further information: A J Scott (4457)

Committee Secretary: S G Hill (Ext 4249)

Recommendations/Decisions Required:

To consider the attached draft report to the Cabinet and make comments accordingly.

1. (Portfolio Holder for ICT and Corporate Support Services) The attached report deals with proposals for a Customer Services Transformation Programme (CSTP) and recent consultancy by Steria Ltd to undertake a scoping study on the implications of introducing a customer contact centre.
2. Details of the scoping study have been sent to members of the Panel separately. Please bring these with you to the meeting. Representatives of Steria will be attending the meeting.

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Report to the Cabinet

Report reference: C/ /2005

Date of meeting:



**Epping Forest
District Council**

Portfolios: ICT and Corporate Support Services

Subject: Corporate Customer Contact Centre – Scoping Study Report

Officer contact for further information: A J Scott (4457)

Committee Secretary:

Recommendations/Decisions Required:

- (1) That the adoption of a Customer Service Transformation Programme (CSTP), spearheaded by a Corporate Customer Contact Centre is, in principle, the preferred option for the Council.**
- (2) To note and agree the findings and budgetary implications of the Corporate Customer Contact Centre scoping study undertaken by Steria Ltd. (Circulated Separately);**
- (3) That a report be made to Council to pursue the implementation of a CSTP as a matter of policy, spearheaded by a Corporate Customer Contact Centre;**
- (4) That external consultants be appointed to support the authority with the development of the CSTP, specifically:**
 - (a) Programme and change management;**
 - (b) Business process re-engineering support;**
 - (c) Staff selection, recruitment and training;**
 - (d) System software configuration; and**
 - (e) Technical and integration services;**
- (5) That the Government approved and encouraged S-Cat pre-competed method of procurement for this programme be pursued in preference to the normal requirements of Contract Standing Orders; and**
- (6) That the further reports detailing the specific CSB, DDF and Capital budgetary requirement for this project to include the accommodation and additional staffing costs which were excluded from the consultants report be reviewed by the Portfolio Holder in consultation with the Standing Scrutiny Panel on ICT and E Government with a view to further recommendation being brought forward.**

Report:

1. In November 2004 the Council appointed Steria Ltd to undertake a scoping study of the budgetary implications of moving forward the corporate aim of introducing a customer contact centre. The study, that has now been completed, would assist the Council in establishing the outline costs and benefits and so support the Council in making a clear decision on how best to proceed.

Steria Scoping Study - Summary

2. The following sections summarise the findings of the consultants report (circulated separately).

(a) CPA Background

3. It is clear that the Council needs to address the ambitions set out in its various e-Government strategies and statements. Most of these ambitions relate to improved customer services and putting the customer “first” in terms of the way direct services are delivered. During the Council’s CPA inspection the Audit Commission raised the issue of the outstanding strategic aim of implementing a customer contact centre and as a result the Council agreed to give this project a high priority status.

(b) Improvement Needs

4. The main aims of a modern local government customer contact centre are to improve the customer’s experience of using all service areas of the Council. Specifically the Council should improve its performance on:
 - (i) Answering only 3 out of 10 customer telephone calls;
 - (ii) Transferring customers from one department to another;
 - (iii) Implementing a consistent telephone answering standard, training every member of staff and measuring compliance;
 - (iv) Enabling customers to access the majority of Council services at a single ground floor reception area at the Civic Offices; and
 - (v) Extending opening hours to meet customer demand.

(c) Customer Improvement Programme

5. The Council has committed itself to improving customer service for at least three years and should now seek to achieve that objective. The benefits of a *Customer First* programme fall into three areas:
 - (i) First class customer service - Better access to Council services; high quality and consistency of customer contact; closed-loop management of enquiries; single view of customer history;
 - (ii) A more efficient authority - Increase back office productivity by answering enquiries in front office and using workflow to ensure process compliance; manage costs by sharing resources (staff, facilities, ICT)
 - (iii) Information for members and officers - Trends in demand (by service/volume/time); pinpoint hotspots; ward level analysis; early warning of service issues; customer management costs; access channel usage/costs; compliments & complaints analysis

(d) Programme

6. The programme of work being recommended would start an authority wide transformation project that will take two to three years to fully implement, but would see an improvement in customer service across the whole authority within the first year.
7. The first area of change would be the front office of the authority, as this will make an immediate difference to the customer. The more complex back office process re-engineering would be left to the later stages of the project to allow “quick wins” to herald the new approach. The Council would use a ‘broad and shallow’ approach to this first stage and this may affect the roles of up to 150 existing staff. It would be essential that a Customer Services Manager be in post to oversee this first stage of the project.

(e) Staffing

8. Based on the volume of calls answered by the Council (1.3m per annum), it is estimated that the Authority will require a staffing level of 35-45 for its customer contact centre and this would require the allocation of approximately 300-350 square metres of office space. The size of the ‘one stop shop’ general reception area, cash receipting area and the number of interview rooms will need to be determined during the project initiation stage and have not been calculated as part of this report.

(f) ICT Investment

9. During this first stage there would be a significant investment in the supporting ICT infrastructure. This would include Customer Relationship Management System (CRM), PC’s, networking and telephony equipment. The Council has recently agreed a new staffing structure for its ICT service and therefore the human resources requirement for this element of the programme should shortly be in place.

(g) Specialist Support

10. The first stage would also require a number of specialist implementation services including:
 - (i) Programme and change management;
 - (ii) Business process re-engineering support;
 - (iii) Staff selection, recruitment and training;
 - (iv) System software configuration; and
 - (v) Technical and integration services.
11. The provision of these services has been included in the cost estimates and is based on a combination of external and internal staff resources being dedicated to this project. The Council will need to consider carefully the mix of external versus internal resource provision in greater detail during the production of the detailed implementation plan.

(h) Business Case

12. Although the Council has not produced a direct business case to back this proposal it is clear from both the National CRM project and the experiences of local Councils in Essex that there are many benefits to be gained from taking this strategic direction. These benefits cover a whole range of customer and business issues from quality of service and increased productivity and efficiency through to democratic engagement and better social inclusion.

13. The consultants report (circulated separately) covers in greater detail all these elements and includes a breakdown of the estimated resource implications. Although this is an ambitious programme for any Authority, particularly one that has experienced some difficulties with change, it is within the Council's capability and it would allow for other key strategic issues to be addressed as part of its implementation.

(i) Procurement

14. Should the Council decide to move forward with this project it is clear that the Council would need to procure many different goods and services. In order to accelerate this process it is being recommended that the Council make use of the Office of Government Commerce (OGC) S-Cat procurement framework. S-Cat is a catalogue based procurement scheme to provide public sector organisations with a simplified means of procuring, and contracting for a wide range of consultancy and specialist services from a variety of service providers.

15. An S-Cat procurement method would benefit the Council in the following ways:

- Compliance with EC procurement regulations
- Ability to call-off urgent requirements quickly
- Very competitive fee rates available to all users
- Choice of Service Providers and consultants
- Easy ordering based on standardised procedures
- Sound contractual protection
- Electronic Commerce facilities

Options for action:

16. In order for the Council to now take a positive approach to its e-Government agenda, Members and Officers need to move forward with a single vision for change and one that is clearly focussed on a much better experience for the customer of Council services. This vision for change could be drawn around a customer service transformation programme that is spearheaded with a corporate customer contact centre. A decision now needs to be made for its implementation and the change of its status from a possible medium term goal to a current corporate priority.

17. The Council could choose not to implement a corporate customer contact centre, and simply enhance customer services with better use of technology. This could include the implementation of a CRM system to link all Council Services together to share customer data and provide a single view of the customer to executive management and Members. This option would not however make the most effective and efficient use of staff resources nor allow for easily managed extended hours of service. The customer would also still need to know what part of the authority is relevant to their enquiry. The technology costs for this approach would be similar to that of a fully implemented corporate customer contact centre.

18. The Council could remain with its existing approach to customer services and not invest in either CRM technology or a customer contact centre. This option would be completely out of line with all other Essex Local Authorities and its existing ICT Policy.

Statement in support of recommended action:

19. The ODPM has linked this years (2005/6) grant directly to the "priority outcomes" and is

expecting that last years allocation of £350,000 plus the allocation of £150,000 in 2005/6 is used to assist in the delivery of all 29 “required” outcomes by March 2006. The Council is currently considering through its Overview and Scrutiny function the allocation of e-Government projects to this additional £500,000 of capital grants and it would seem appropriate for a large proportion of this capital to be used to assist in the financing of the Council’s Customer Service Transformation Programme.

20. ECC are currently implementing their customer contact centre and phase one started operations in April 2005. This has provided a single access point for all Essex Citizens to the full range of ECC services. Now that this Council is electronically linked to both the data and voice networks of ECC it would be possible to provide a fully joined up service between both contact centres in the future. Indeed the Essex Council’s referred to in the consultants report are already planning for this capability. This will allow for fully integrated, shared and consistent information/transactional resources across all Essex Councils.
21. Epping Forest District Council must now move quickly and decisively into the arena of a customer first approach and into customer contact centres as a first step in order to participate in the currently emerging drive towards both Essex and regional wide based services. The Council has been taking a sensibly cautious approach to this subject for the past three years, but now with most Essex Districts implementing such centres and the Council having reached a point where it has a number of key strategic issues to address, a corporate Customer Contact Centre would drive through the Council the required change in attitudes towards customer service and give the Authority chance to regain a true corporate direction to the provision of a ‘customer first’ council.

Consultation undertaken:

22. Discussions on the future implementation of a Council customer contact centre have been made with the following groups:
 - informal briefing for all members of EFDC
 - Cabinet
 - Management Board
 - Accommodation Working Party
 - Senior Management Team
 - Essex Online Partnership
 - ICT and E-Government Working Group
23. Consultation with the Overview and Scrutiny Panel has been conducted both informally and at a meeting of the Panel. The current report has been submitted to the Panel and their views will be reported at the Cabinet. The detailed work on taking the project forward is proposed to be undertaken by the Portfolio Holder in consultation with the Scrutiny Panel.

Resource implications:

Budget provision: IEG Grant 2004/5 and additional Capital, CSB and DDF expenditure (see recommendations)

Personnel: Nil

Land: Nil

Community Plan/BVPP reference: Council Plan ref 92

Relevant statutory powers: None

Background papers: Cabinet Report on Customer Contact Centre, IEG Statement, Corporate ICT Strategy

Environmental/Human Rights Act/Crime and Disorder Act Implications: None

Key Decision reference: Forward Plan 2005/6

Corporate Contact Centre Scoping Study

Page 13

Prepared by:

Richard Baldwin, Senior Business Consultant

Patrick Stephenson, CRM Practice Manager

Nicholas Rawlings, Consultant

1 Document control

- Ownership
 - ▶ Steria Limited is responsible for the production and maintenance of this document. It is issued by Steria Consulting richard.baldwin@steria.co.uk, to whom any change requests or queries should be directed.
- Version Control
 - ▶ This document is issued and maintained in accordance with Steria procedures.
 - ▶ Any change to the document will increase its version number.
- Version Record

Version	Date	Description of Change	Changed By
0.1d	2 June 2005	First draft	Richard Baldwin
1.0d	9 June 2005	Draft following Steria internal review	Richard Baldwin
1.1	15 June 2005	Version issued to the Authority following review of draft with Stephen Metcalfe, Peter Haywood and Adrian Scott. Updated footers; clarification of some findings;	Richard Baldwin
1.2	27 June 2005	Final version including updates discussed with the Authority	Richard Baldwin

Document control

- Distribution
 - ▶ Whilst this document may be circulated electronically; for distribution outside Epping Forest District Council, permission must be obtained in writing from Steria. Electronic distribution of this document will be according to a distribution list held and maintained by the Steria Consulting.

References

Ref. No.	Date	Title	Doc. No. / Source
1	March 2005	The Local Government Customer Service Benchmark Report	Mystery Shoppers Ltd.
2	Dec 2004	National Projects at the Heart of Excellent Services: The Benefits of CRM	CRM National Project

Glossary

Term	Description
CRM	Customer Relationship Management
Erlang	A unit of measurement of traffic density in a telecommunications system
ODPM	Office of the Deputy Prime Minister

Contents

1. Document control
2. Summary
3. Background and scope
4. Findings
 1. Strategy, organisation and resources
 2. Change and programme management
 3. Customer service
 4. Telephone call volumes and performance
 5. Senior Officers' perspective on customer service priorities
 6. Senior Officers' view of how a contact centre would benefit the Authority
5. Corporate contact centre route map
6. Executive level cost model
7. Solution outcomes and benefits
8. Recommendations
9. Appendices
 1. Telephony data
 2. Contact centre operational measures

Summary

A *Customer First* programme will enable transformation of the whole authority

- ‘*Customer First*’, an authority wide transformation programme will take 2-3 years to implement
 - ▶ Stop talking about a contact centre project; start implementing a *Customer First* programme
 - ▶ Change the front office first, leave time-consuming back office process re-engineering until later
 - ▶ Scope must include people and resources; organisation; culture; technology & process
- The *Customer First* programme will improve every service area within a year
 - ▶ Initially, use a ‘broad & shallow’ implementation approach
 - May affect the roles of approximately 100-150 staff
- Recruit a Customer Services Manager early, to drive the implementation
- Based on a calls answered volume of 1.15 million per annum, we estimate the authority will require a staff of 35-45 customer service officers in a *Customer First* centre occupying a space of approximately 260-320 square metres and:
 - ▶ Technology infrastructure
 - CRM servers; PCs; telephony equipment; networking; CRM & telephony software
 - ▶ Implementation services
 - Programme and change management; business process re-engineering support; training; CRM & telephony software configuration; technical and integration services
 - ▶ Adjacent area to accommodate the authority’s reception and customer meeting room requirements

If the Authority chooses to conduct its own implementation of technology only, external costs = c.£0.5m

	Capital £000
Hardware	200
Software	310
Total	510

*Excludes accommodation and staff costs

To implement the whole Customer First programme the Authority will need to invest £2m* over 5 years

	Capital £000	Revenue £000
Hardware	200	
Software	310	
Services	900	
Total	1410	605

*Excludes accommodation and staff costs

Background and scope of the study

3 The CRM National Programme for local government defines CRM as follows:

“CRM stands for Customer Relationship Management. The customer, in this case, can be a citizen, business representative, intermediary or partner.

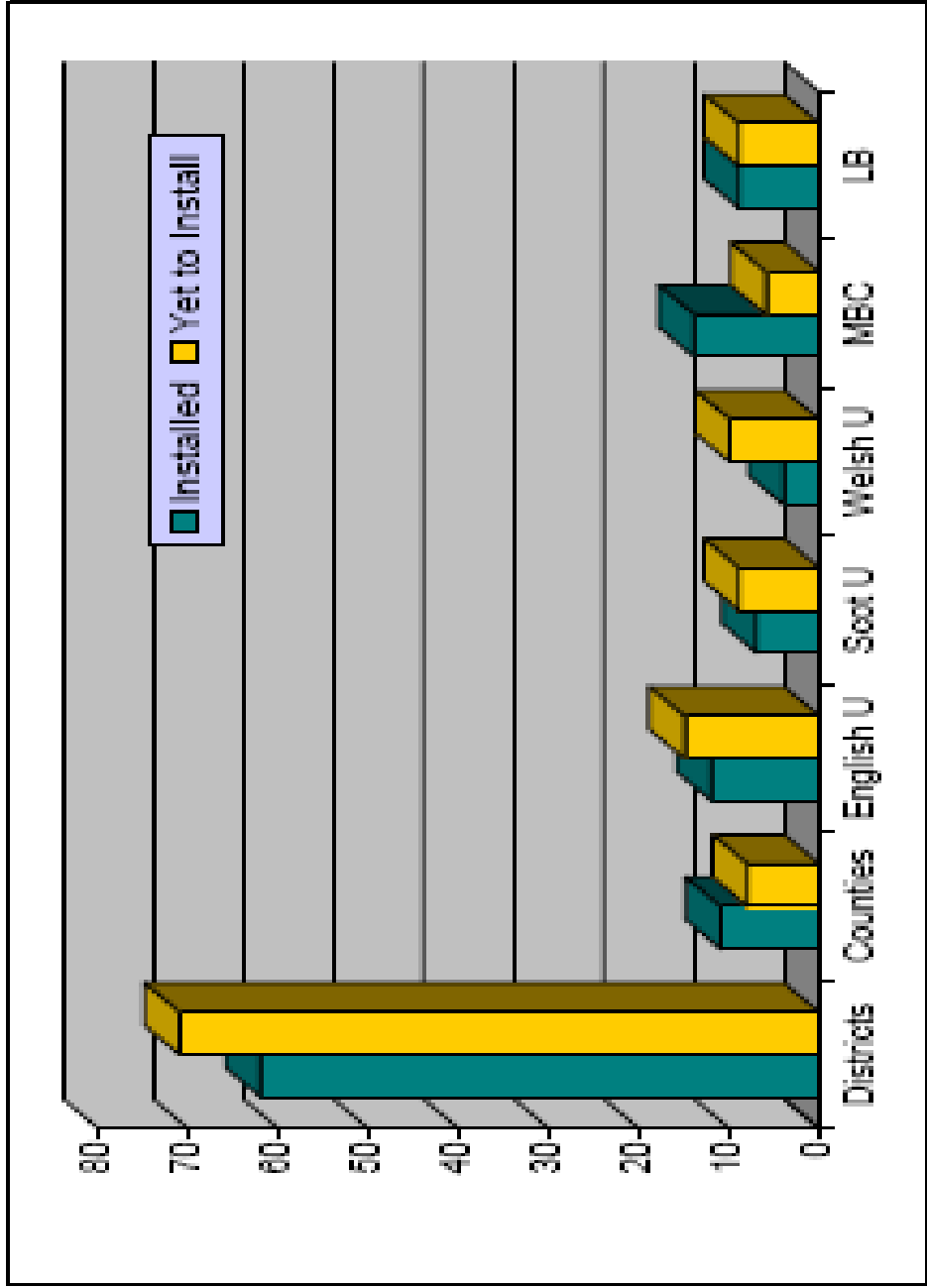
CRM is the discipline of improving the way customers are managed, through changes in business processes, people, organisation and technology.”

3 The CRM National Programme for local government identifies the key drivers

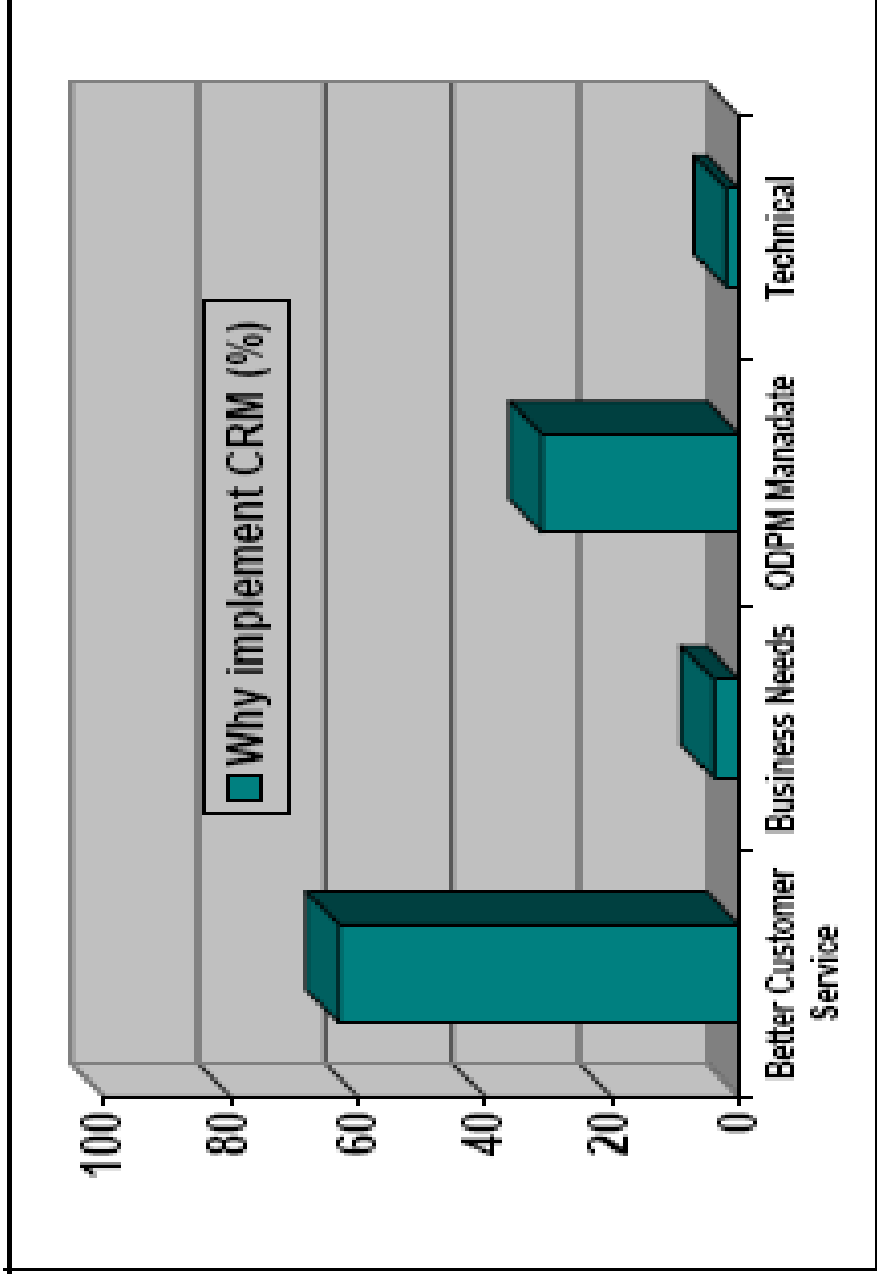
“The key drivers for a CRM programme within the public sector tend to be the improvement of services to citizens, together with some real expectation of improving the efficiency and the effectiveness of the organisation.

Other drivers could be to focus limited resources on those in most need or to maximise revenue from customer facing activities.”

By summer 2004, half of UK local authorities had introduced CRM...



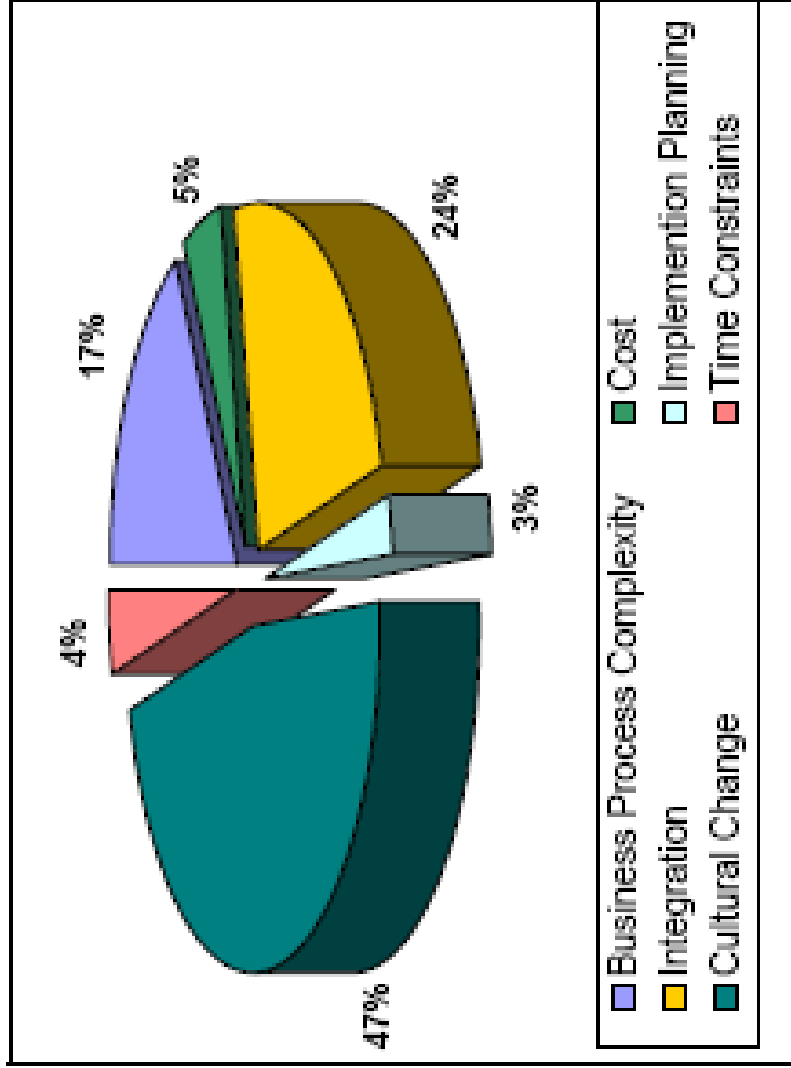
...mainly because they want to provide a better service to customers



62% expecting better customer services

Source: CRM National Programme Survey July 2004

... but its not all plain sailing, there are challenges



Top three challenges

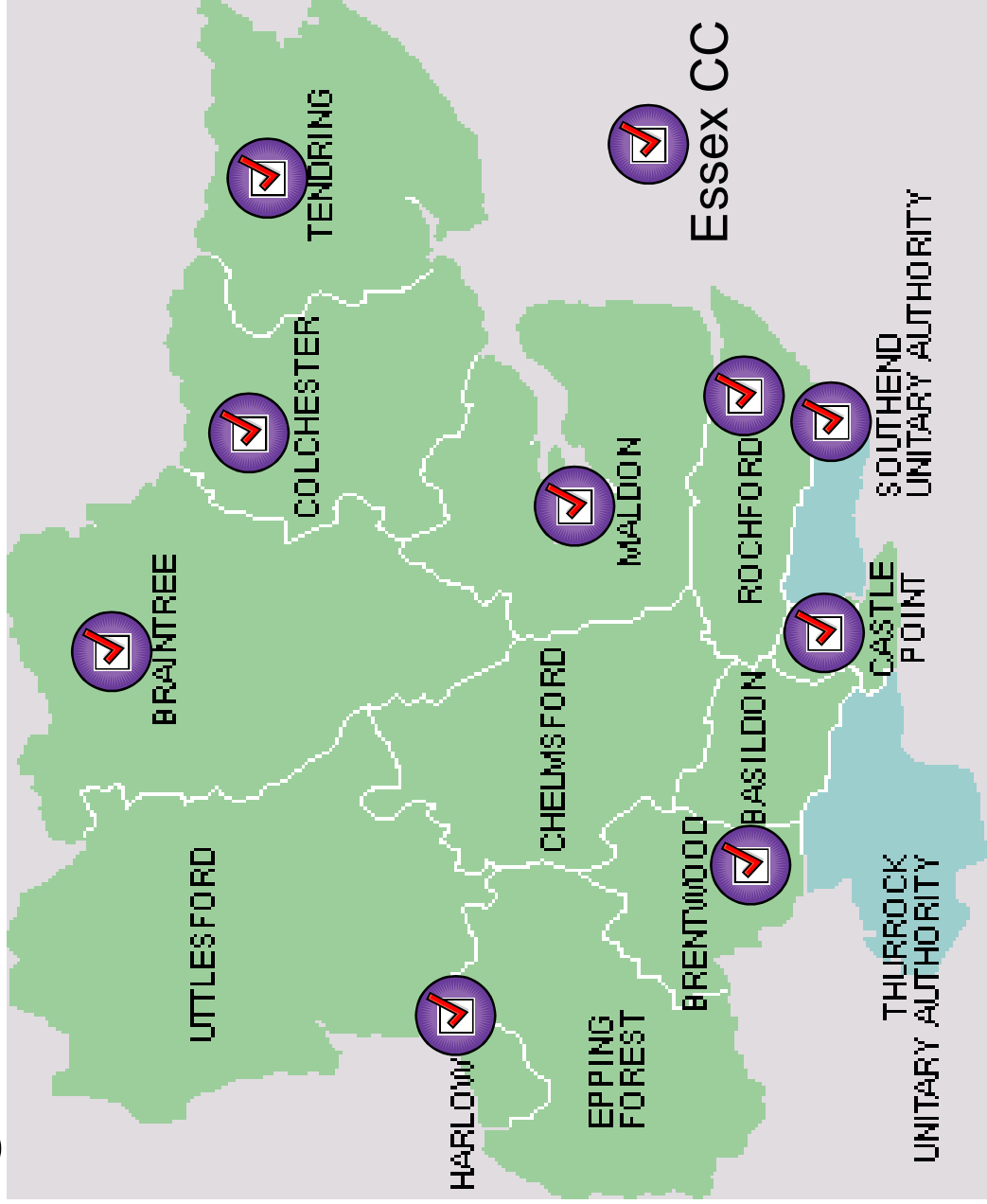
- Cultural change
- System integration
- Business process change

Source: CRM National Programme Survey July 2004

3 Essex local authorities are investing in customer service programmes

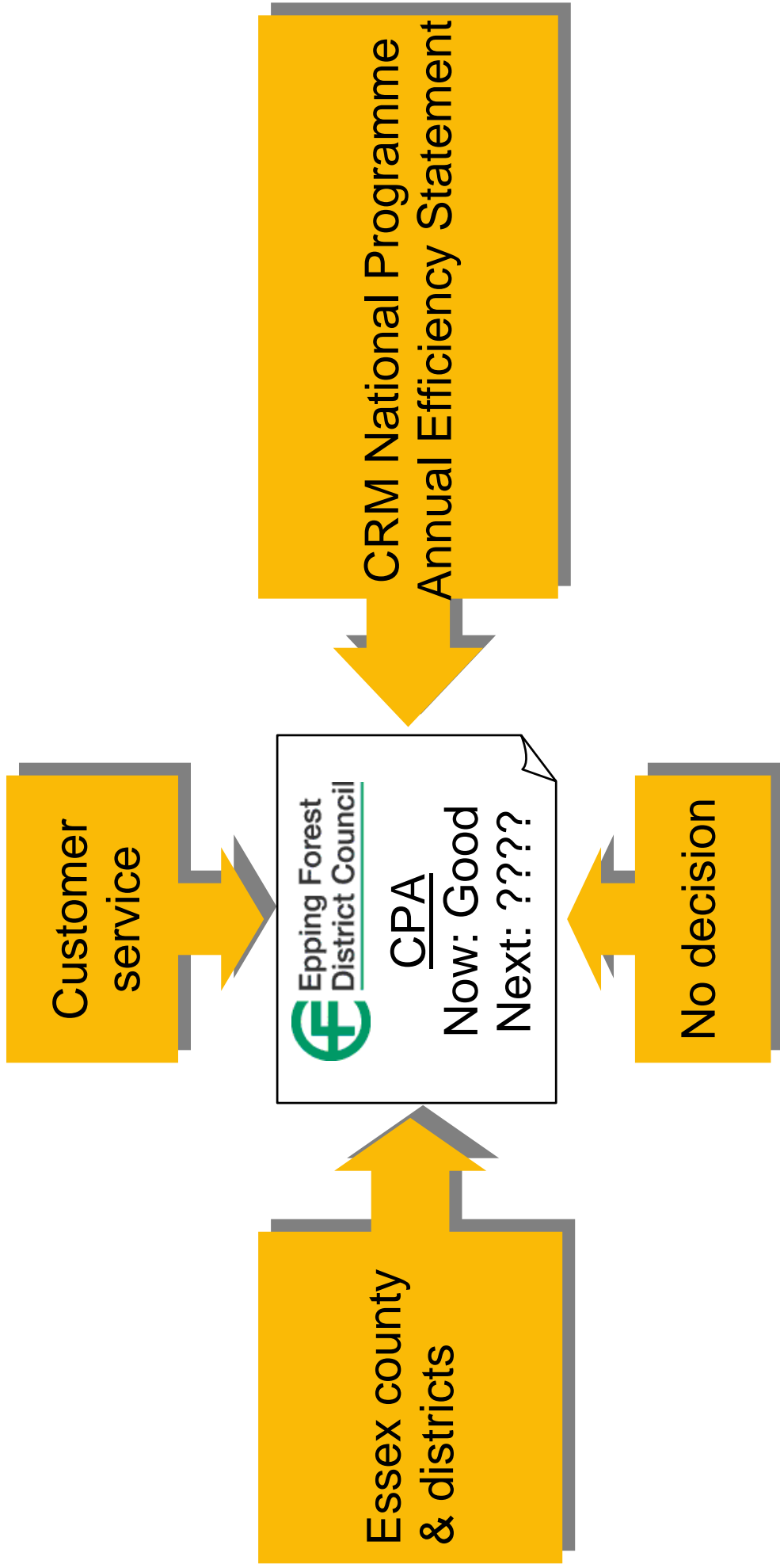


= Live, or implementation in progress

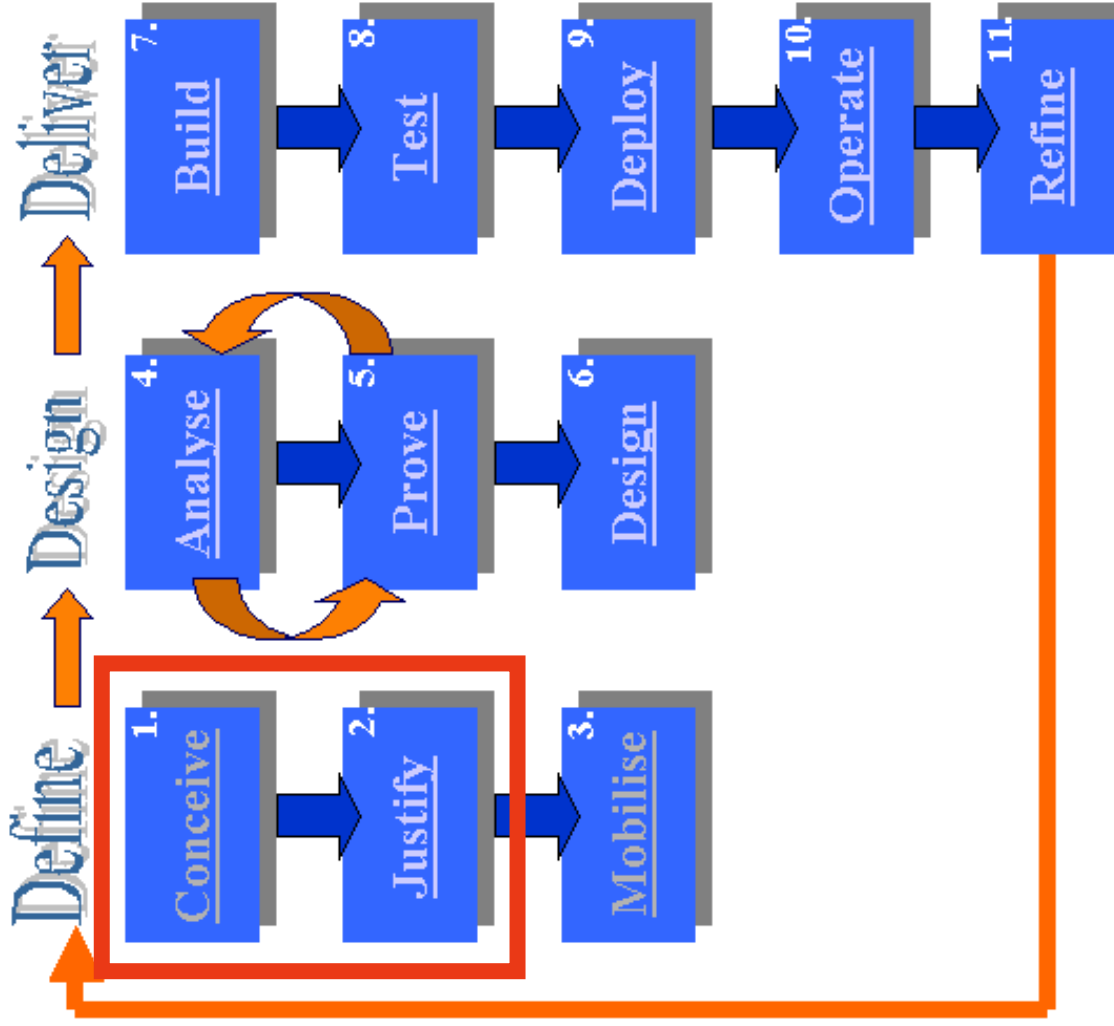


3

The authority now has the opportunity to change



3 The study addresses the first two stages of the ODPM National CRM Implementation Framework



Scope of this report includes all service areas, but excludes detailed analysis of stakeholders, accommodation & cost/benefit

- Study objectives
 - ▶ To provide the council with outline costs and benefits to support a decision on how best to proceed with a Corporate Contact Centre
 - ▶ To inform and involve council senior officers at this early stage of project definition.
- Scope of study
 - ▶ At this stage, all Council services are considered to be in scope
 - ▶ Accommodation strategy – out of scope
 - This work will inform the Council's accommodation strategy and will not consider any elements of accommodation outside the needs of a contact centre
 - ▶ Stakeholder consultation – limited scope
 - During this assignment, Steria consulted with officers of the Council.
 - The Council recognises that customers are the key stakeholder group affected by this programme. The Council understands that further work will be required to consult with its customers.
 - ▶ Detailed cost/benefits review – out of scope
 - This work will not include any study of the existing processing workload of council staff.



Scoping Study PID

3 Senior officers throughout the authority were consulted

- Chief Executives
 - ▶ Peter Haywood
- Housing
 - ▶ Alan Hall, Head of Service
 - ▶ Roger Wilson, Assistant Head
 - ▶ Paul Pledger, Assistant Head
- Environmental Services
 - ▶ John Gilbert, Head of Service
 - ▶ Joyce Chamberlain, Office Manager
- Finance
 - ▶ Bob Palmer, Head of Finance,
 - ▶ Janet Twinn, Benefits Manager
 - ▶ Rob Pavey, Revenues Manager
- Research & Democratic Services
 - ▶ Ian Willett, Head of Service
 - ▶ Reception staff
- Works
 - ▶ Mick Merrick, Chief Works Officer
- Legal, Administration & Estates
 - ▶ Colleen O'Boyle, Head of Service
 - ▶ Mike Tipping, Administration Manager
- Leisure Services
 - ▶ Derek McNab, Head of Service
 - ▶ Laura MacNeill, Assistant Head
- Planning & Economic Development
 - ▶ John Preston, Head of Service
 - ▶ Barry Land, Assistant Head (Development Control)
 - ▶ John Kershaw, Assistant Head (Building Control)
- Human Resources & Performance Management
 - ▶ Tony Tidey, Head of HR and Performance Management
- ICT & Support Services
 - ▶ Adrian Scott, Head of ICT & Support Services
 - ▶ Switchboard staff

We have also had the opportunity to brief Stephen Metcalfe, Portfolio Holder for ICT & Support Services

Findings

Strategy, organisation and resources

4 The Audit Commission notes that the authority is slow to make progress in terms of customer access

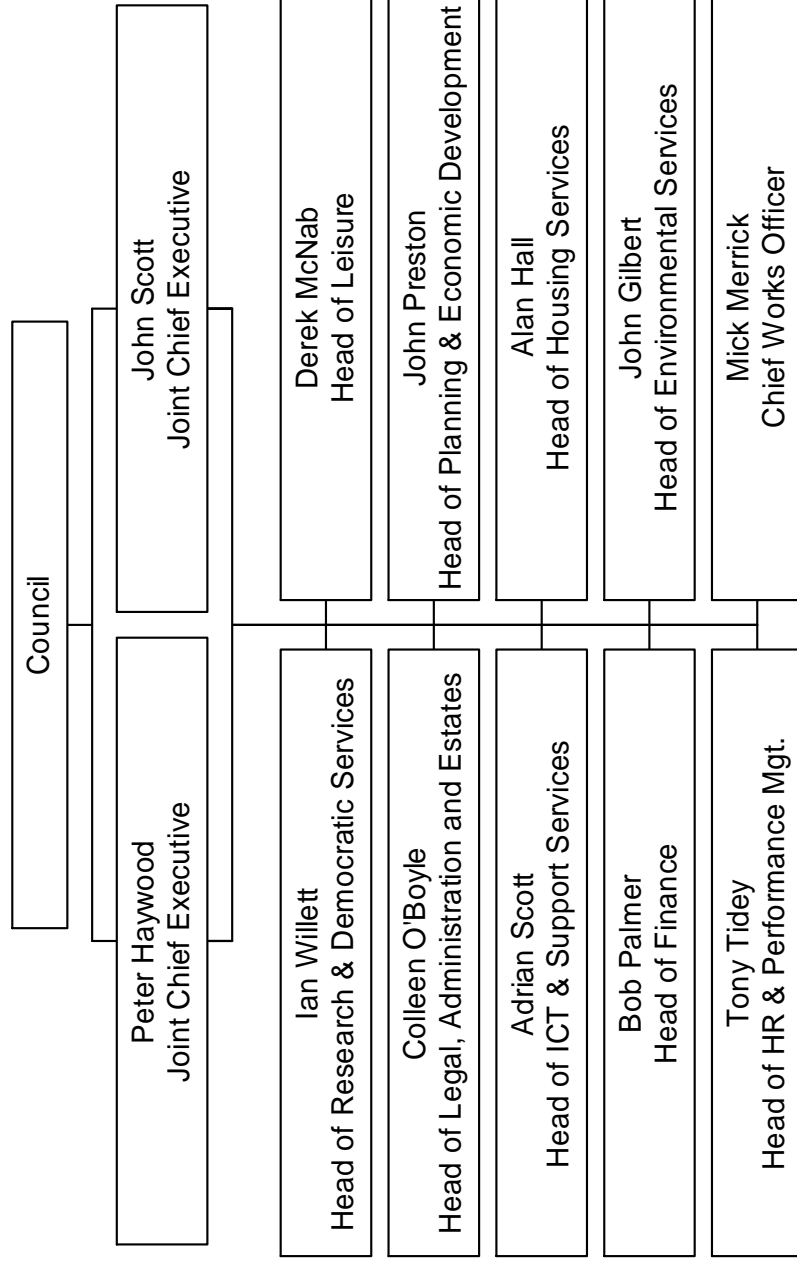
- Customer contact centre first mentioned in 2001
- Appeared in 2002, 2003, 2004 IEG statements
- The Audit Commission picked up action point on improvement plan

Implementing Electronic Government					
<p>Access Channels</p> <p>Note: Access channels are the various routes through which people might contact, or be contacted by, local service providers to undertake electronically enabled interactions.</p> <ul style="list-style-type: none"> • Publication of approved strategy for development of access channels • Local service websites (tailored to achievement of transactional status¹ for corporate ".gov.uk" website) • Specialist portals for local authority services in two-tier areas • Contact centres (e-enabled & dealing with at least 80% of incoming telephone calls to the local authority) • Establishment of fully e-enabled one stop shops for face-to-face customer contact 	Black	Red	Red	Red	Amber
	Red	Red	Amber	Amber	Amber
	Red	Red	Amber	Amber	Green
	Red	Red	Red	Red	Amber
	Red	Red	Red	Red	Red
	Red	Red	Red	Red	Amber

4

There is uncertainty amongst the senior officers about the future organisational model

- There are two Chief Executive Officers: they are tasked to design a new officer structure by December 2006, for implementation by March 2008
- Highways service moved to Essex CC (June 05); Leisure Centres partner selected



The Authority faces organisational change issues in any event. A Customer First programme would make it easier to change the structure whilst improving customer service

4 The Authority is organised along service profession lines

- Some services that a customer would legitimately expect to be processed in a consistent way, are operated in separate parts of the Authority
 - ▶ Graffiti removal (Research & Democratic Services)
 - ▶ Grounds maintenance (Leisure)
 - ▶ Incident / nuisance reporting (Research & Democratic Services)
 - ▶ Housing repairs (Housing)
 - ▶ Environmental nuisance; Waste (Environmental Services)
 - ▶ Highways (Transferred to Essex CC 6 June)

Many authorities now operate a single customer-focused service request process

Senior Officers recognise that resources will come under scrutiny as the re-organisation approaches

- Some roles will be replaced by the contact centre
- Some roles will remain, but will change
- * Further work will be required to assess the organisation and staffing impact

Transformation of customer services operations could affect 100-150* existing roles

Findings

Change and programme management

The Authority should not under-estimate the amount of Change Management support required

- Senior officers know that change programmes are challenging
 - ▶ ‘Single Status’ was a bitter experience
 - ▶ Despite union support, there was considerable resistance
 - ▶ Senior Management Team had to remain united to drive through the change
- The current “professional silo” structure mitigates against openness to new thinking on how to deliver excellent customer service
- The work force are constrained by an organisational model that hardly encourages inter-departmental co-operation
- Whilst there is a view that corporate resources are minimal, Service Areas perceive they are over-stretched and cannot afford to share resources to support the corporate change programme

A ‘Customer First’ programme will involve broad range of change issues.

Typically it involves: many stakeholder groups; new HR issues; major accommodation alterations; technology change & integration; significant business process change; potentially new procurement and service provision models, and a good deal of legal work.

In the past, the Authority has had a mixed record of using programme management

- Mixed approach to programme governance
 - ▶ Risk that too many inter-dependent projects are established without overall direction
 - ▶ The 'Customer First' programme must be established at the appropriate level
 - ▶ Some projects used disciplined approach, e.g PRINCE2
- Perhaps as a result of its historic stability, the Authority does not have the full range of expertise required to drive through a complex programme
 - ▶ With the exception of Single Status, there is no evidence of corporate programmes over recent years
- Risk aversion
 - ▶ A culture of cautious behaviour exists amongst senior officers
 - ▶ New initiatives suffer a lack of buy-in

Findings

Customer service

There are some examples of good customer service: but this has not permeated throughout the authority

- Some front line staff, e.g. Information Centres, have considerable knowledge of Council Services. However:
 - ▶ There is no evidence that this information is managed
 - ▶ The Authority is at risk of issuing different information at every outlet
 - ▶ The Authority Council publishes immense amounts of information in various formats and to different standards
 - At what cost?
 - ▶ There is little consistency between the published information across access channels

There are pockets of good practice in terms of customer service management

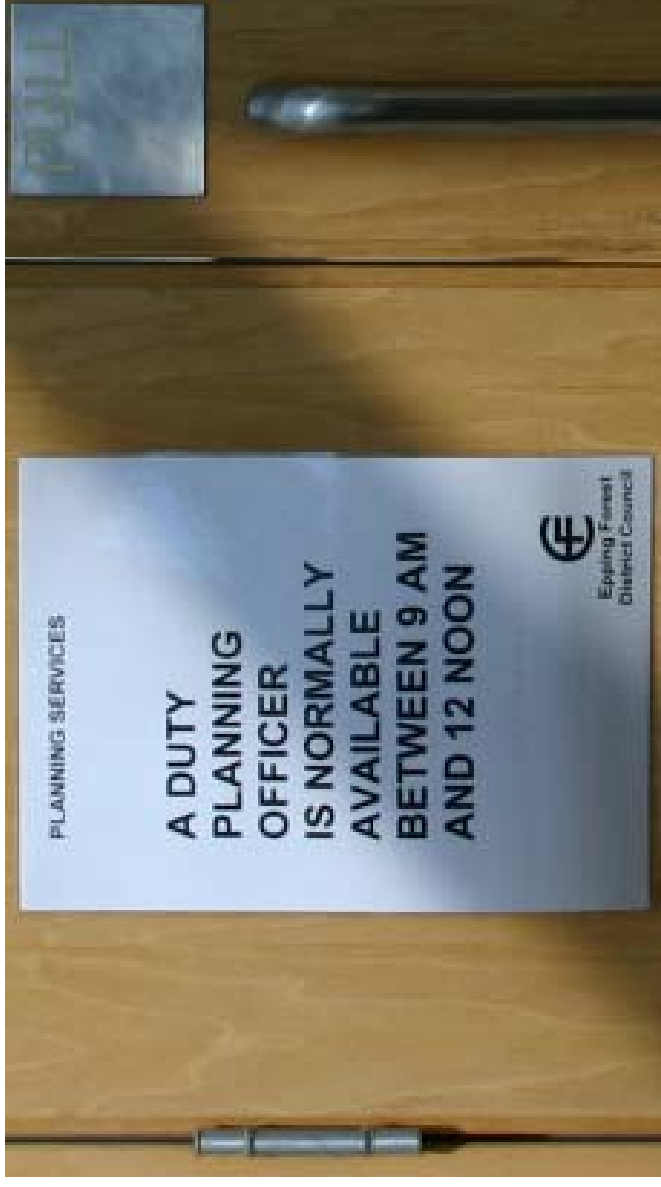
- Benefits service plan a front and back office reshuffle
 - Good news: the service has a desire to improve the service
 - Drawback: On the corporate scale, this is tactical change with limited impact
- Appointment cards for Housing Repairs
 - Request logged; customer automatically receives appointment/reply card; Electronic work orders go to DSO
- Mystery shopping
 - ▶ Whilst the Authority did not commission the survey, it provides a benchmark against other Councils[Ref. 1]
 - Highly quantitative, historical
 - Advantage: Shows how the Council compares with other authorities
 - Drawback: No comparison with other organisations the Council's customers use
 - E.g. Local businesses, service providers
- Dispersed Information Centres
 - But, are they in the optimum locations?
- Internet payment service
- Customer satisfaction surveys conducted for some services
 - To inform BVPIs
 - Conducted on a statutory basis only. No plans for a regular survey.

However, the Council needs to transform Customer service in a range of areas

- Opening hours
- 5 reception desks in Epping (4 too many)
- Lack of consistently applied standards
- Telephone answering performance is poor
- ‘Pass the customer’
- Bottom quartile BVPIs in a number of areas
 - ▶ Housing - kept appointments
 - ▶ Benefits – processing time
 - ▶ Planning – application processing time; standard searches

4 Opening hours are not designed around customer needs

- Planning Officer
 - ▶ More 'off-duty' than 'on'
- Finance have, in the past, used a recorded message to capture customer contact for periods of the working day
- Number of customer calls left unanswered
 - ▶ 0800 - 0900 : 150/day
 - ▶ 1700/1715-1800 : 35/day
 - Source: EFDC Statistics



The Authority appears to suffer from a lack of internal communication and adherence to standards

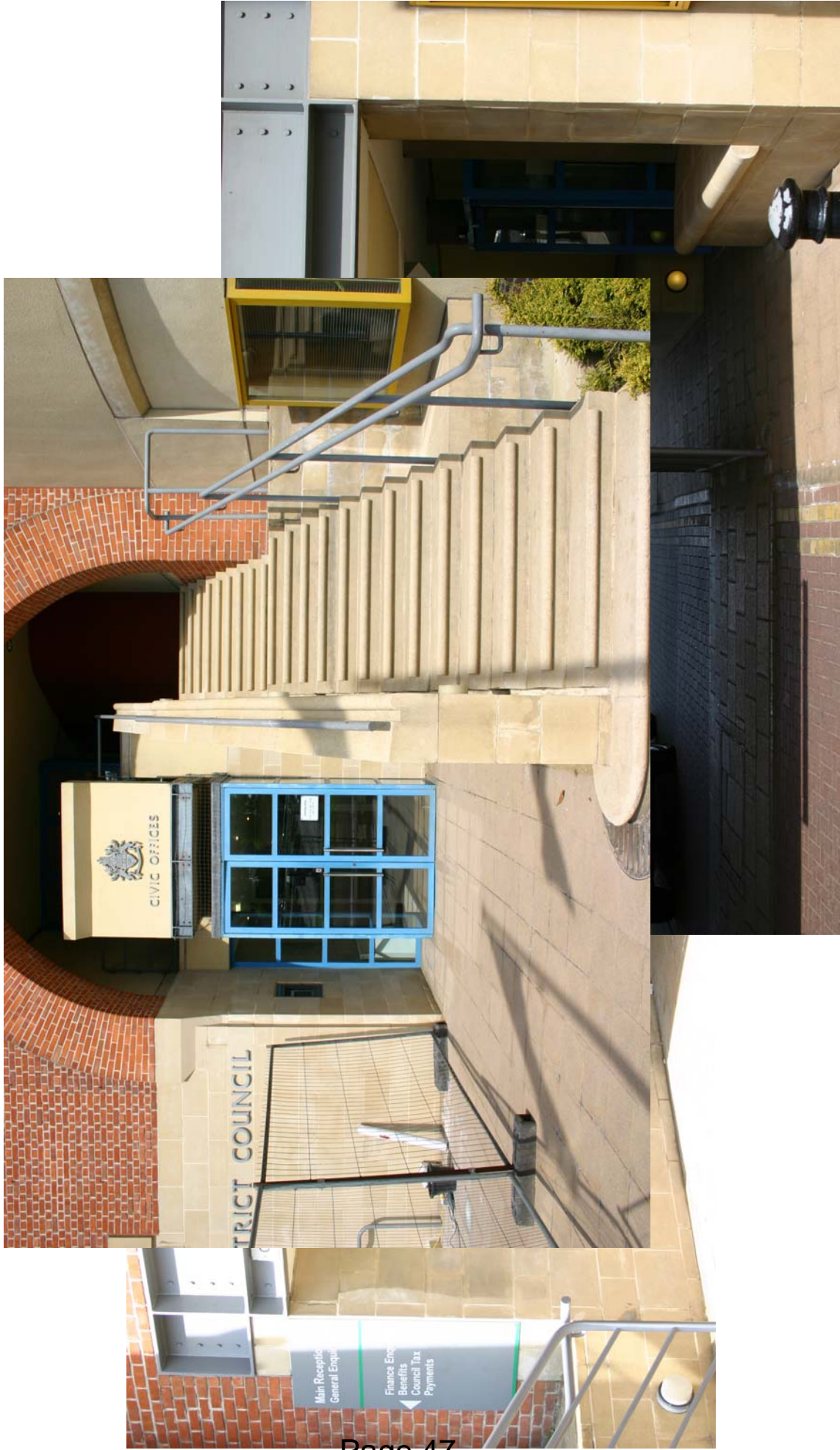
- Lack of knowledge sharing between departments
 - ▶ Telephony data shows that call between extensions are, more often than not, left unanswered
 - ▶ Departments tend not to hold each other in high esteem
- If there is a corporate standard for customer service, adherence is inconsistent
 - ▶ Leads to patchy customer service
 - ▶ Voicemail and telephone answering

Findings: Customer service - Civic Offices

Page 46

We took the opportunity to experience the Epping Civic Offices from a customer perspective

4 Where to start? The stairway to heaven?



Findings : Customer Service – Civic Offices

What message are we sending?

4



4 Receptions galore!



4

The long march

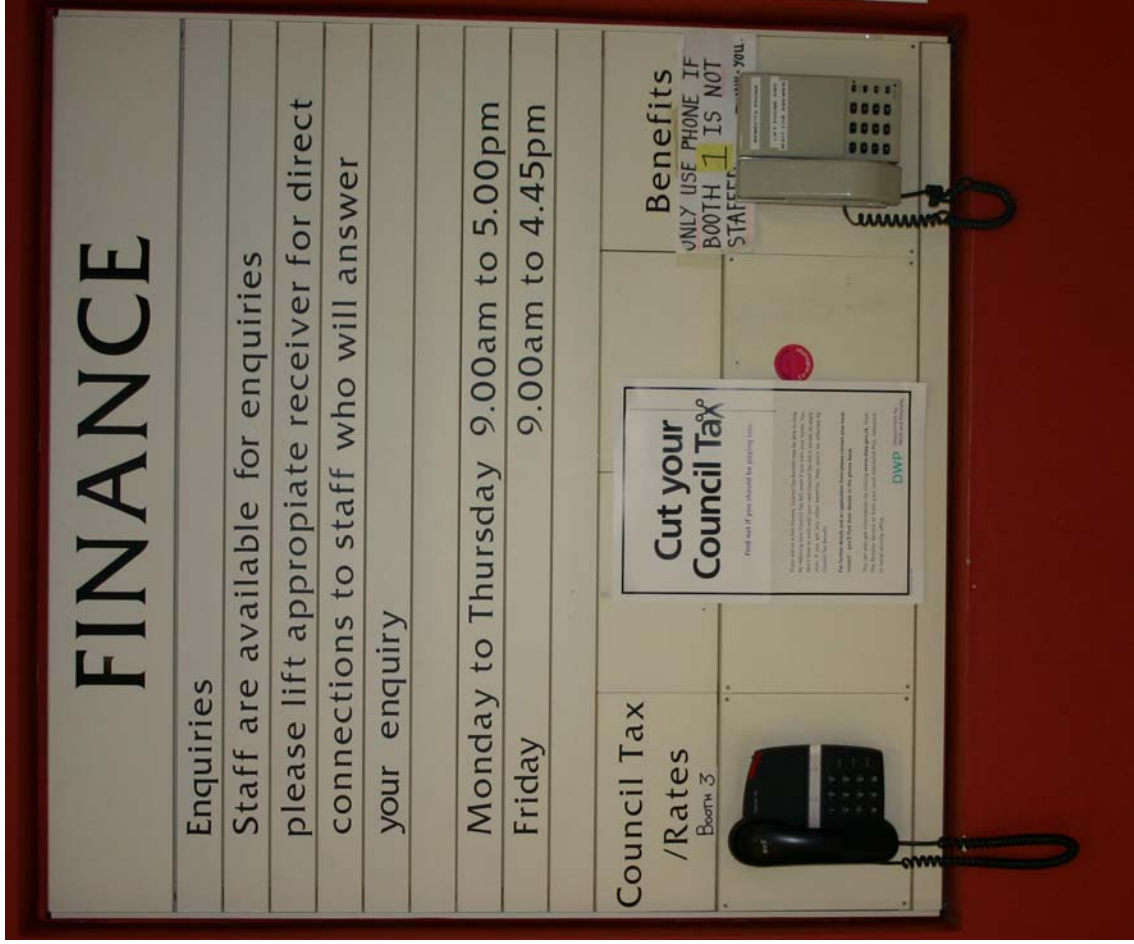


4 The sign was added after a cabbie was found snoring in the corner.



What message are we sending?

4



The council receives visits from citizens to make payments and for other enquiries

4

- Payments
 - ▶ 129,000 per annum
- Face-to-face enquiries at Information Centres
 - ▶ 50,000 per annum



4 Council run cash offices are becoming rarer in Essex

- Chelmsford: closed 31 March 2005
- Cash office still in place
 - ▲ Brentwood
 - ▲ Castle Point
 - ▲ Colchester
 - ▲ Harlow
 - ▲ Southend
 - ▲ Tendring
 - ▲ Thurrock
 - ▲ Uttlesford
- Maldon: “under review”
- Basildon
 - ▲ Post office or Payzone only
- Do not publicise cash office, if one exists
 - ▲ Braintree
 - ▲ Rochford

Page 54

Most Councils actively encourage other payment methods

Findings

Telephone call volumes and performance

The telephone statistics are expressed at Head of Service level: they include volume and performance data

- Environmental Services
 - Volume of calls
 - ▶ Answered
 - ▶ Unanswered
 - ▶ Voicemail
 - Distribution of calls over day, week, year
 - Working hours and out of hours
 - Time to answer
- Finance
- Legal, Administration and Estates
- Leisure Services
- Planning and Economic Development
- Housing Services
- Research and Democratic Services
- ICT
- Works
- Human Resources and Performance Management

4 Annual Calls Answered

We estimate that between April 2004 and March 2005 Epping Forest District Council answered 1.15 million calls distributed as follows:

Route	Calls per annum	% of Calls
Switchboard	373,480	33 %
Direct to extensions	768,992	67 %
Total	1,142,472	100 %

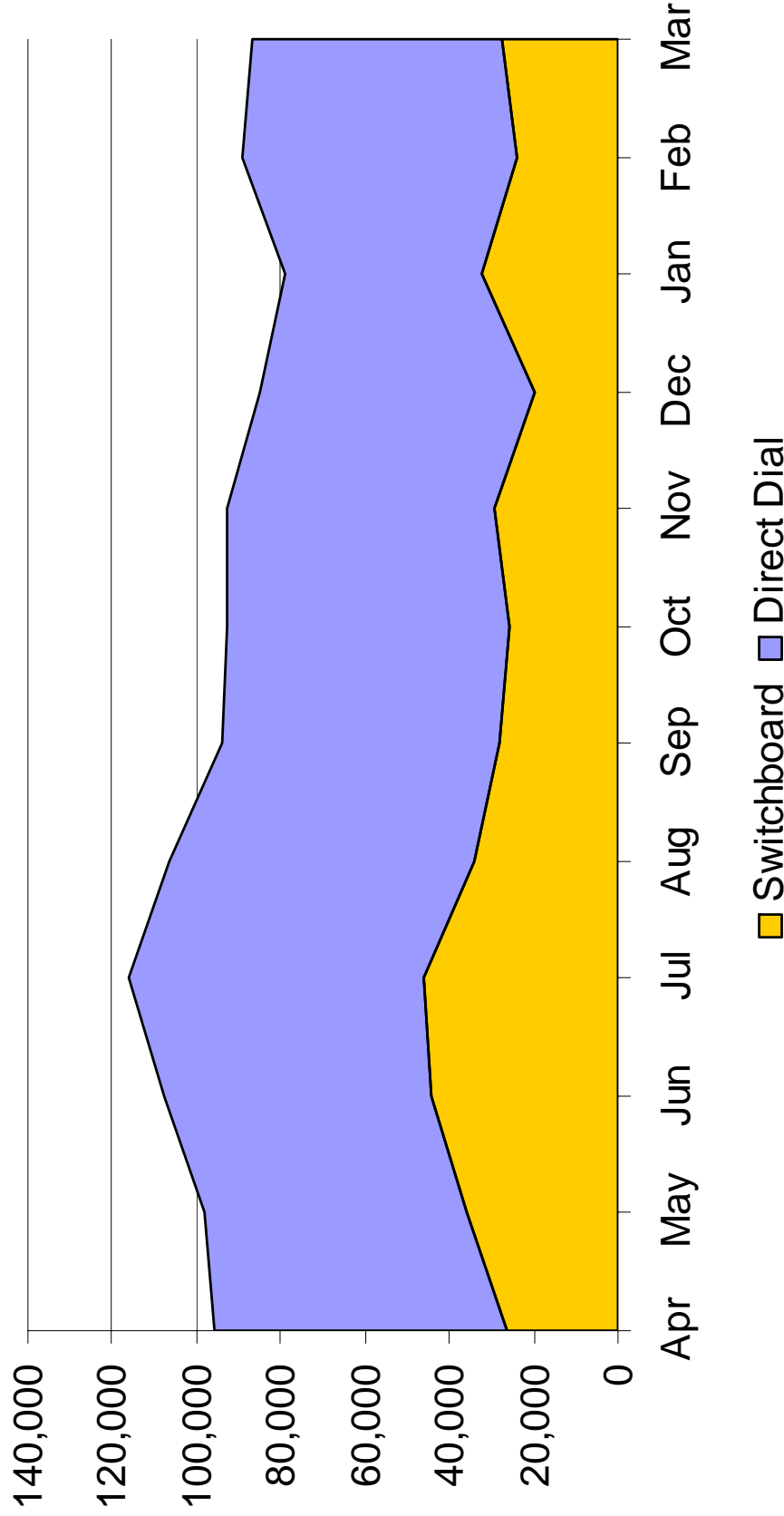
Source: Epping Forest District Council Call Logger

Answered calls: breakdown by month April 2004 – March 2005

Time period	Switchboard	DDI Calls	Total Calls
April	26,086	69,438	95,524
May	35,640	62,487	98,127
June	44,557	62,900	107,457
July	45,788	70,531	116,319
August	33,989	72,419	106,408
September	28,314	65,451	93,765
October	25,806	66,796	92,602
November	29,553	63,059	92,612
December	19,784	65,251	85,035
January	32,315	46,604	78,919
February	24,092	64,870	88,962
March	27,556	59,185	86,741
Total:	373,480	768,992	1,142,472

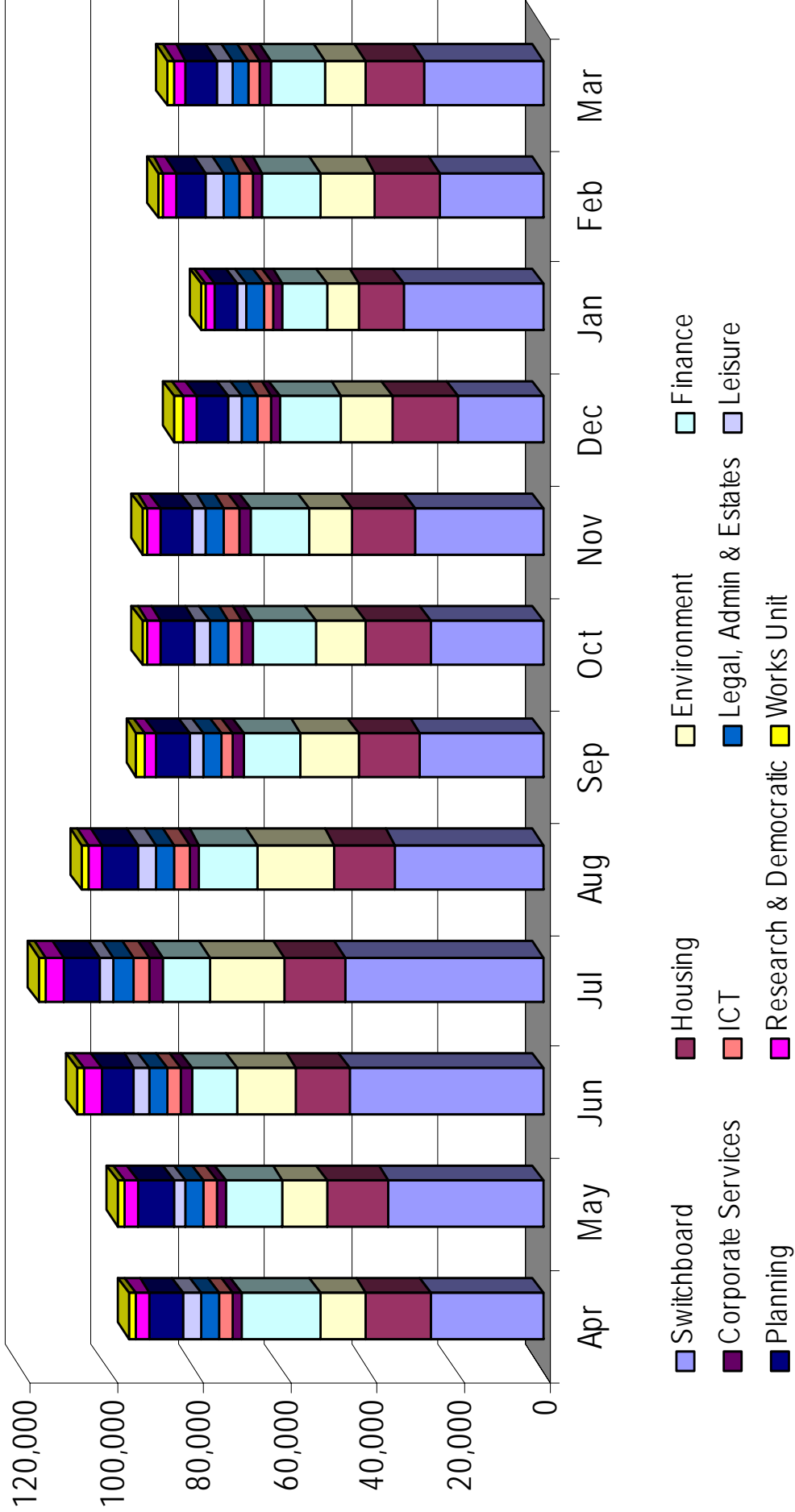
Source: Epping Forest District Council Call Logger

4 The summer peak in call volume is unusual. Many District Councils have their peak in the Spring.



Source: Epping Forest District Council Call Logger April 2004 – March 2005

4 The service area analysis shows a summer rise in calls to Environment: probably pest related enquiries



Source: Epping Forest District Council Call Logger

4 Note: the service area analysis excludes Highways and Leisure Centre calls

	Switchboard	Housing	Env.	Finance	Corp. Services	ICT	Legal, Admin & Estates	Leisure	Planning	Research & Demo.	Works Unit
Apr	26,086	14,690	10,776	17,919	2,202	3,184	4,003	4,119	7,623	3,395	1,527
May	35,640	14,105	10,198	13,224	2,209	2,928	4,378	2,691	8,238	2,926	1,590
Jun	44,557	12,304	13,956	10,083	2,541	3,300	4,100	3,480	7,342	4,235	1,558
Jul	45,788	13,778	17,464	10,827	2,967	3,769	4,471	3,434	7,999	4,261	1,561
Aug	33,989	14,095	17,948	13,168	2,359	3,438	4,466	3,960	8,290	3,083	1,612
Sep	28,314	14,210	13,307	13,070	2,854	2,505	4,003	3,451	7,598	2,777	1,676
Oct	25,806	15,427	11,074	14,386	2,663	3,068	4,465	3,412	7,744	3,085	1,472
Nov	29,553	14,498	10,087	13,327	2,794	3,255	4,111	3,285	7,409	2,794	1,499
Dec	19,784	15,172	11,561	14,122	2,004	3,093	3,918	3,022	7,464	3,132	1,763
Jan	32,315	10,024	7,718	9,885	2,430	2,136	3,874	2,257	5,063	2,022	1,195
Feb	24,092	14,607	12,648	13,290	2,564	2,711	3,874	4,234	6,661	2,799	1,482
Mar	27,556	13,556	9,413	12,202	2,656	2,595	3,811	3,412	7,173	2,857	1,509
Total:	373,480	166,466	146,152	155,503	30,243	35,982	49,474	40,758	88,604	37,366	18,444

4 On average, calls are relatively short

Service	Average Call Duration*
Environment	00:02:05
Planning	00:02:05
Finance	00:02:32
Housing	00:02:02
Corporate Services	00:01:57
ICT	00:01:56
Legal	00:02:00
Leisure	00:01:30
Research & Democratic	00:02:03
Works Unit	00:01:49
EFDC Average	00:02:00

* Answered calls only

Source: Epping Forest District Council Call Logger

How much 'expert' advice can you convey in two minutes?

4 In the service areas, the Authority fails to answer 3 out of 10 of calls

Department	% of Unanswered Calls
Environment	37%
Planning	27%
Finance	19%
Housing	32%
HR	33%
ICT	30%
Legal	17%
Leisure	50%
Research	27%
Works Unit	30%
Average:	31%

Source: Epping Forest District Council Call Logger

See Appendix 3 for more detail on calculation for hunt groups

4

Time to answer: the hunt from Hell...

Source	Dest'n	Switch	Date / Time	Durati	Ring tin	CLI/OLI/T
T148	E	Civic Offices	17-Mar-05 11:47:56	00:00:44	00:44	019927
T148	E	Civic Offices	17-Mar-05 11:48:42	00:00:36	00:36	019927
T148	E	Civic Offices	17-Mar-05 11:49:18	00:00:38	00:38	019927
T148	E	Civic Offices	17-Mar-05 11:49:58	00:00:35	00:35	019927
T148	E	Civic Offices	17-Mar-05 11:50:35	00:00:46	00:46	019927
T148	E	Civic Offices	17-Mar-05 11:51:23	00:00:38	00:38	019927
T148	E	Civic Offices	17-Mar-05 11:52:03	00:00:54	00:54	019927
T148	E	Civic Offices	17-Mar-05 11:52:58	00:00:42	00:42	019927
T148	E	Civic Offices	17-Mar-05 11:53:41	00:00:37	00:37	019927
T148	E	Civic Offices	17-Mar-05 11:54:20	00:00:37	00:37	019927
T148	E	Civic Offices	17-Mar-05 11:54:59	00:00:37	00:37	019927
T148	E	Civic Offices	17-Mar-05 11:55:38	00:01:19	01:19	019927
T148	E	Civic Offices	17-Mar-05 11:56:58	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 11:57:38	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 11:58:19	00:01:20	01:20	019927
T148	E	Civic Offices	17-Mar-05 11:59:42	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 12:00:23	00:00:40	00:40	019927
T148	E	Civic Offices	17-Mar-05 12:01:04	00:00:47	00:47	019927
T148	E	Civic Offices	17-Mar-05 12:01:52	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 12:02:33	00:00:38	00:38	019927
T148	E	Civic Offices	17-Mar-05 12:03:11	00:00:48	00:48	019927
T148	E	Civic Offices	17-Mar-05 12:04:01	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 12:04:42	00:00:36	00:36	019927
T148	E	Civic Offices	17-Mar-05 12:05:18	00:00:37	00:37	019927
T148	E	Civic Offices	17-Mar-05 12:05:58	00:01:23	01:23	019927
T148	E	Civic Offices	17-Mar-05 12:07:22	00:00:37	00:37	019927
T148	E	Civic Offices	17-Mar-05 12:08:00	00:00:36	00:36	019927
T148	E	Civic Offices	17-Mar-05 12:08:37	00:00:39	00:39	019927
T148	E	Civic Offices	17-Mar-05 12:09:42	00:00:36	00:36	019927

Protected data

Protected data

4 There's more!

T148	E*		Civic Offices	17-Mar-05 12:10:19	00:00:59	00:59	01992
T148	E*		Civic Offices	17-Mar-05 12:11:19	00:00:57	00:57	01992
T148	E*		Civic Offices	17-Mar-05 12:12:19	00:00:52	00:52	01992
T148	E*		Civic Offices	17-Mar-05 12:13:12	00:00:45	00:45	01992
T148	E*		Civic Offices	17-Mar-05 12:13:57	00:00:38	00:38	01992
T148	E*		Civic Offices	17-Mar-05 12:14:37	00:00:38	00:38	01992
T148	E*		Civic Offices	17-Mar-05 12:15:17	00:00:48	00:48	01992
T148	E*		Civic Offices	17-Mar-05 12:16:06	00:00:41	00:41	01992
T148	E*		Civic Offices	17-Mar-05 12:16:48	00:00:45	00:45	01992
T148	E*		Civic Offices	17-Mar-05 12:17:34	00:00:42	00:42	01992
T148	E*		Civic Offices	17-Mar-05 12:18:17	00:01:00	01:00	01992
T148	E*		Civic Offices	17-Mar-05 12:19:18	00:00:40	00:40	01992

Source: Epping Forest District Council Call Logger

This customer waited more than 30 minutes, bouncing around a pair of hunt groups

- Note: Many long waits (in excess of 10 minutes) were found throughout the authority

Current baseline: maximum percentage of calls answered at first point of contact

Route	Calls per annum	% of calls
Switchboard	373,480	22%
Unanswered calls	415,235	24%
Voicemail calls	27,313	2%
Maximum calls dealt with at first point of contact	883,122	52%
Total calls	1,699,150	100%

The telephony reports indicate that the Authority needs approximately 35-45 customer service officers

- We have used three methods to arrive at and validate this estimate
 1. Steria customer service officer calculator
 2. Traffic flow reports from the EFDC telephone switch
 3. Erlang.com customer service officer calculator
- Steria calculator
 - ▶ 35-45 customer service officers
- Traffic flow reports
 - ▶ 30-62 lines
- Erlang calculator
 - ▶ 35-40 customer service officers
- Several variables affect the number of staff. Refer to Appendices 1 & 2.

Erlang: a definition

A unit of measurement of traffic density in a telecommunications system.

The erlang describes the total traffic volume in one hour, or 3600 seconds.

For example, 60 calls in one hour, each lasting 5 minutes, results in the following number of erlangs:

Minutes of traffic in the hour = number of calls x duration

Minutes of traffic in the hour = 60 x 5

Minutes of traffic in the hour = 300

Hours of traffic in the hour = 300/60

Hours of traffic in the hour = 5

Traffic figure = 5 erlangs

Network designers use the erlang to understand traffic patterns within a voice network and use the figures to determine how many lines are required between a telephone system and a central office or between network locations.

Erlang calculations are further broken down as follows:

Erlang B -- the most commonly used traffic model. Erlang B is used to work out how many lines are required if the traffic figure during the busiest hour is known. This model assumes that all blocked calls are cleared immediately.

Extended Erlang B -- similar to Erlang B, this model can be used to factor in the number of calls that are blocked and immediately tried again.

Erlang C -- this model assumes that all blocked calls are queued in the system until they can be handled. Call centres can use this calculation to determine how many customer service officers to staff, based on the number of calls per hour, the average duration of class and the amount of time calls are left in the queue.

The Erlang is named after the Danish telephone engineer A. K. Erlang.

Findings

Page 68

Senior Officers' perspective on customer service priorities and benefits

Whilst Senior Officers would like to improve customer service, they express concern about changes

Priorities

- Handle customers in one interaction
- Better use of, and sharing of, resources, freeing Officers to deal with new or uncommon technical matters requiring expert judgement
- Increase access hours
- Shared reception and customer interview facilities

Concerns

- How many people will I lose?
- When the contact centre is established, where to draw the line between back and front office functions?
- Would a contact centre be staffed with new hires or transfers from the back office?
- Will Customer Service Officers be multi-skilled enough to handle every requests for every service area?

Findings

Page 70

Senior Officers' initial views on which enquiries could be handled in a contact centre

Some services have started to think about which of their services are best handled in a contact centre

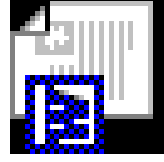
- Local Land Charges
 - ▶ General enquires , e.g. how much is a search etc
- Vacant shops, land for sale
- Land ownership enquiries
- In/out of district enquiries
- Out of hours service
- Emergency incidents
- Job applications, issuing information packs

Commendably, some have started to look beyond their own areas, and think about corporate processes

- Log and process applicants, members and objectors wishing to speak at Regular Area Planning sub-committees
- Member training: booking of courses and despatch of joining details
- Updates to subscriptions for Council agendas and minutes, both for citizens and members
- Electoral Services: despatch of forms and handling routine enquiries
- Community Safety
 - ▶ Reporting an incident, e.g. alleged anti-social behaviour;
 - ▶ Requests for graffiti removal
 - ▶ Requests for new CCTV
 - ▶ Community nuisance calls, e.g. alcohol free zone related
- Compliments and Complaints: logging, distribution and tracking)
- Address change handling & notification between departments)

Corporate processes

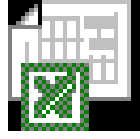
Corporate contact centre route map



route map

Executive level cost model

To enable the Authority to conduct further modelling, the Steria *Customer First* cost model tool is available for EFDC to access.



EFDC Cost Model

Solution outcomes and benefits

EFDC Senior Officers' perspective

Why local authorities implement CRM

7 EFDC Senior Officers identified some of the benefits of a contact centre

- People and Resources
 - ▶ Release technical officers from routine enquiries and allow professional staff more time to do their expert tasks
 - ▶ Enable Authority to address recruitment and retention issues
 - ▶ Increased flexibility by sharing resources in Contact Centre, reduces reliance on limited service area specific admin resources
- Customer Service
 - ▶ Improve the quality and capability of first time contact
 - Better training for front office staff about the range of Council Services
 - ▶ Minimise passing from one staff member to another
 - ▶ Increase access hours
- Culture
 - ▶ Break down the ‘Silo Mentality’
- Information
 - ▶ Would like more information about who is (and is not) using services

7 Based on their CRM experiences, local authorities have obtained many benefits (page 1)

- Quality of Service
 - ▶ Improved response times for answering incoming service requests. Increasing the number of services through a given service channel
 - ▶ Increasing the number of access channels available to the customer to suit local needs (e.g. web, walk-in, telephone, email etc)
 - ▶ Improve the relationship between the customer service officer and customer by providing a single consistent view and detailed history
 - ▶ Offering customers joined up, personalised, accessible services
- Productivity/ Efficiency
 - ▶ Reducing the number of processes by sharing a common customer interfacing process
 - ▶ Reduce the number of activities in a process through process reengineering
 - ▶ Improve customer tracking & service history, making it faster to resolve queries or complete a new service request
 - ▶ Share information cross departments & directorates, reducing the need to recapture the information
 - ▶ Improve the productivity of back-office staff by directing calls to the front office

Source: CRM National Programme

7 More benefits – CRM National Programme (page 2)

Management information

- ▶ Monitoring the provision of service against service level agreements with individual departments
 - ▶ Improved management planning by easily gathering statistical & demographic information on the individuals using the services of the borough (including age, language, mobility, etc)
 - ▶ Modelling of services provided to the customers (e.g. manage resources to focus on high demand services, or opening hours for optimum cost & service provision)
 - ▶ Councils are better able to manage resources such as assets and staff by:
 - altering service centre service opening times; reducing building costs; enhancing selected services
 - ▶ Providing reports to the members of the council on the level of services provided
- Cost reductions
- ▶ Reduce the number of times a customer is asked for information
 - ▶ Reducing infrastructure costs such as multiple buildings, multiple ICT systems & hardware etc.
 - ▶ Reduce the amount of correspondence sent to customers
 - ▶ Fraud reduction resulting from improved customer records

Source: CRM National Programme

More benefits – CRM National Programme (page 3)

- Performance management and resource planning
 - ▶ Improvements to cross charging; forecasting; incident hotspots etc
- Economic vitality
 - ▶ e.g. increasing the benefits take up by citizens
- Democratic engagement:
 - ▶ Providing councillors with examples of hotspots in the community.
- Efficiency
 - ▶ Scheduling of staff;
 - ▶ Reuse of data; joined-up services.
 - ▶ Synergistic benefits, e.g. improving efficiency by implementing both CRM & Workflow
- Improved environment
 - ▶ Fly tipping; abandoned cars; lighting
- Inclusion
 - ▶ Bridging the e-divide by providing multiple-access channels.

Source: CRM National Programme

Recommendations

Page 80

Single programme focus
Implementation approach
Change management
Member involvement
Customer needs
Organisation
Accommodation
Benefits management
Project initiation

Link the Contact Centre to other key projects under a 'Customer First' Programme

- Potentially interdependent projects:
 - ▶ Contact centre
 - ▶ Accommodation
 - ▶ Mobile / Home Working
 - ▶ (not an exhaustive list...)
- It becomes all too easy to forget that the citizens of the district, the customers, should be at the centre of all the thinking
- The Authority may want to come up with a programme name of its own: whatever name is chosen, the sentiment must place the customer at the forefront.



Stop talking about a 'Contact centre project': start implementing the 'Customer First Programme'

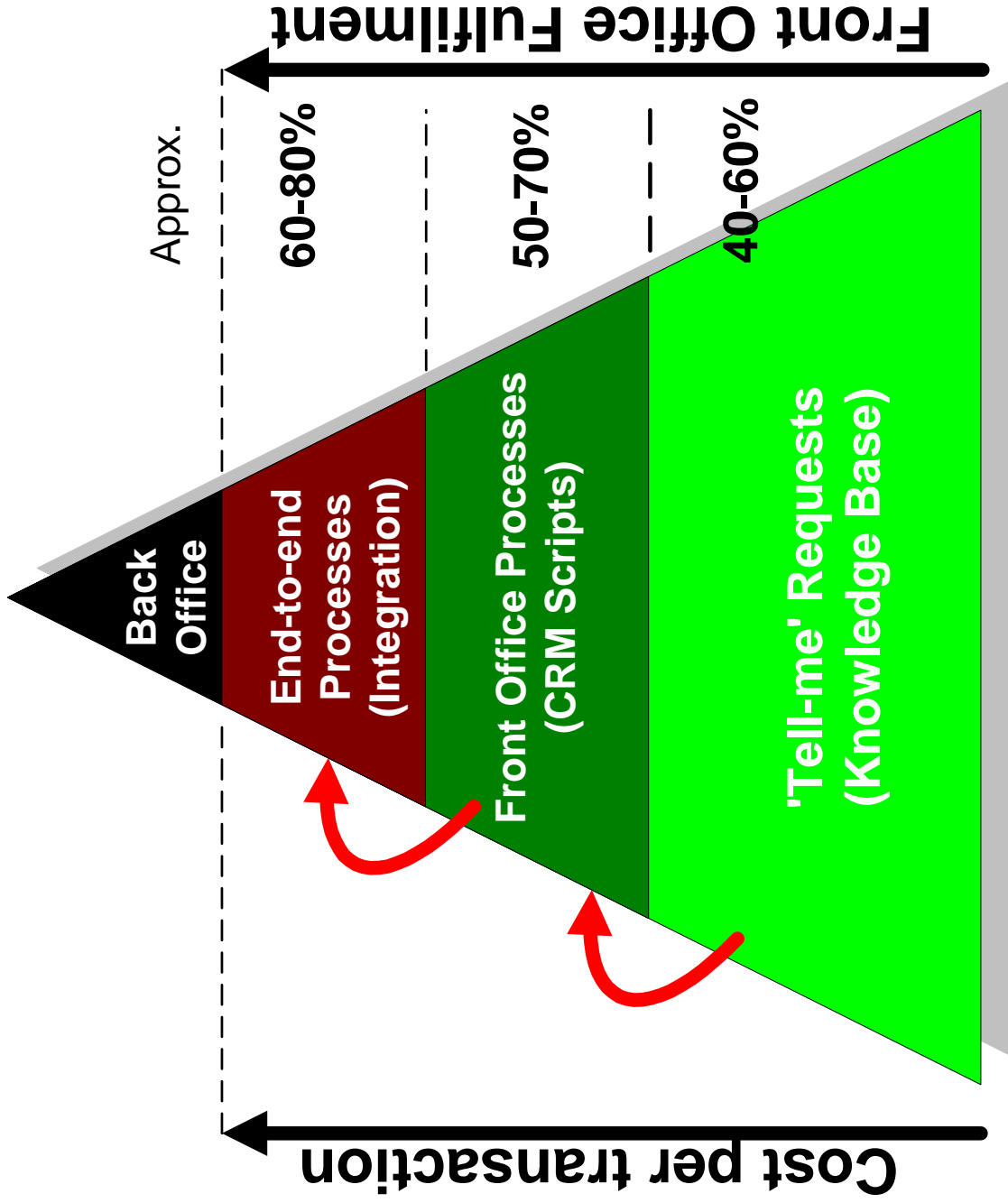
Steria adopts a three phase approach to the delivery of transformation programmes

- Steria's approach ensures that the programme is delivered within a broad change management perspective



- Our approach:
 - ▶ recognises the importance of the 'softer' aspects of change
 - ▶ commits to releasing demonstrable value at each phase
 - ▶ describes a 'journey' through what it is often unknown terrain

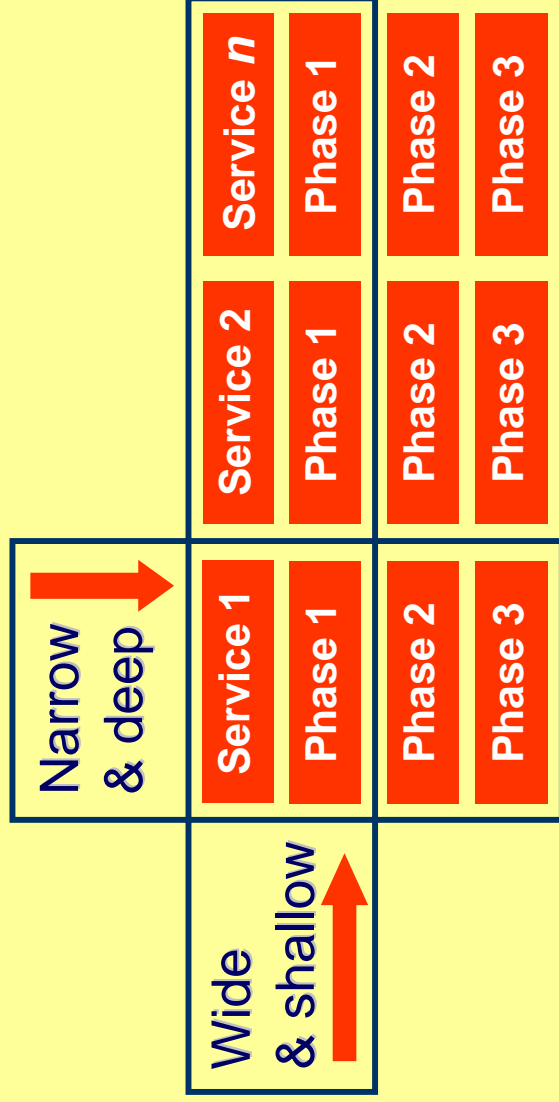
Over time, more transactions can be completed in the customer services operation



8 Include every service area early in the consultation and implementation

- Phase 1: Improve accessibility, consistency & quality of service
- Phase 2: Support organisational transformation
- Phase 3: Deliver innovation in services

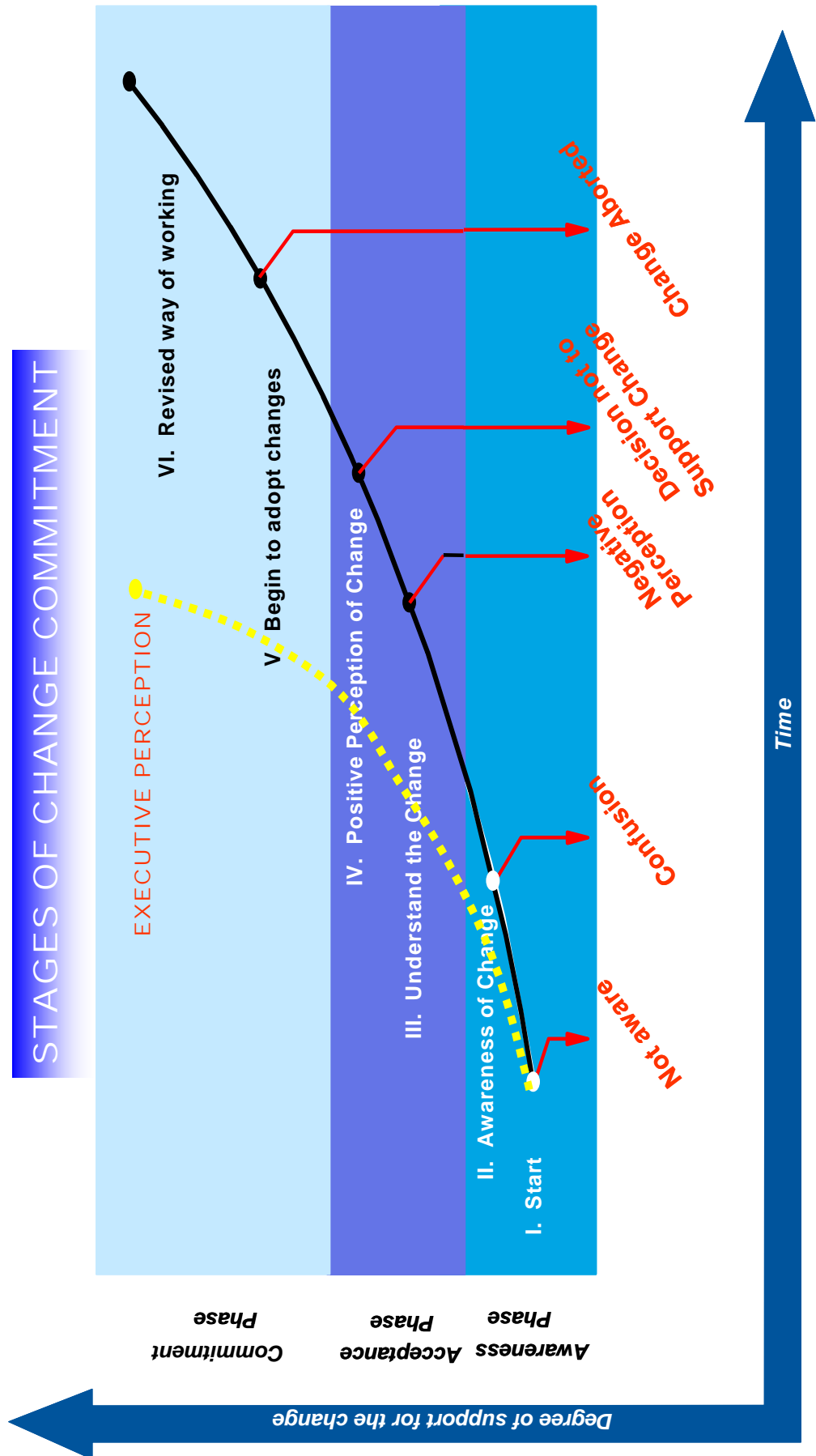
Source: ODPM CRM Maturity Framework



- Factors that affect service area implementation sequence**
- ▶ Council priorities / executive direction
 - ▶ Potential for efficiency gains
 - ▶ Call volume vs. contact centre capacity
 - ▶ Seasonality in demand
 - ▶ Resources
 - ▶ Service area process complexity
 - ▶ Back office system complexity

Senior stakeholders will need to arrive at a consensus implementation priority for each service area

When managing change be aware that senior management and employees sometimes disconnect



Based upon ODR ® Inc. Materials

8

Start a work stream to manage the organisational change

92% are Organisational Change Issues

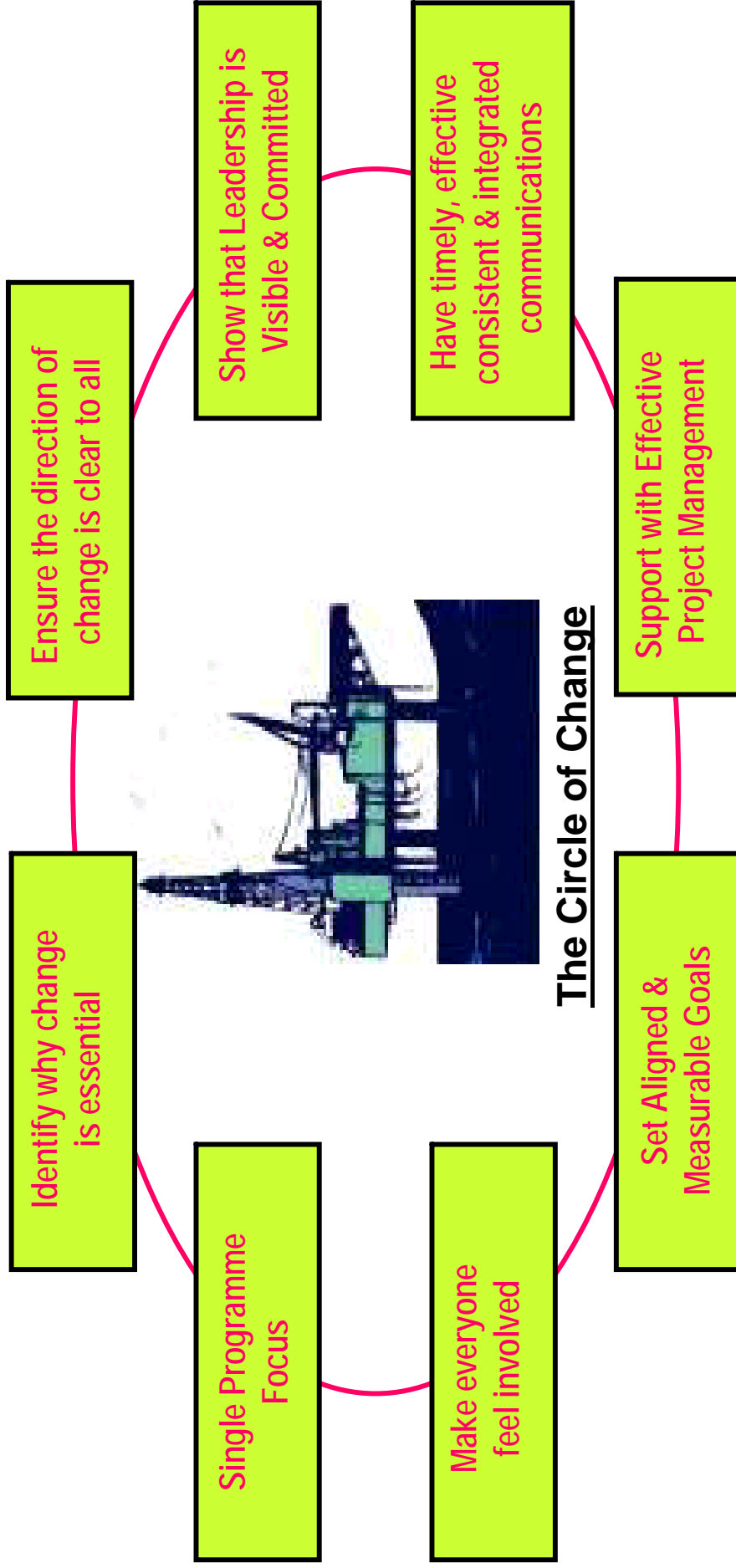
- 42% - Leadership
 - ▶ Senior Mgmt. involvement and understanding of the issues
 - ▶ Middle Mgmt. support/attitude
- 27% - Organisational/Cultural issues
 - ▶ Clear view of direction, opportunities, benefits and process
 - ▶ Alignment of technology, process & people
- 23% - People issues
 - ▶ Lack of commitment
 - ▶ Lack of involvement and inability to unleash creativity
- 4% - Technology issues
- 4% - Other

Source: Organisation dynamics - Jim Karkowsky

The vast majority of project failures occur when there is little or no focus on leadership, cultural and people issues

8

Use a rigorous organisational change method

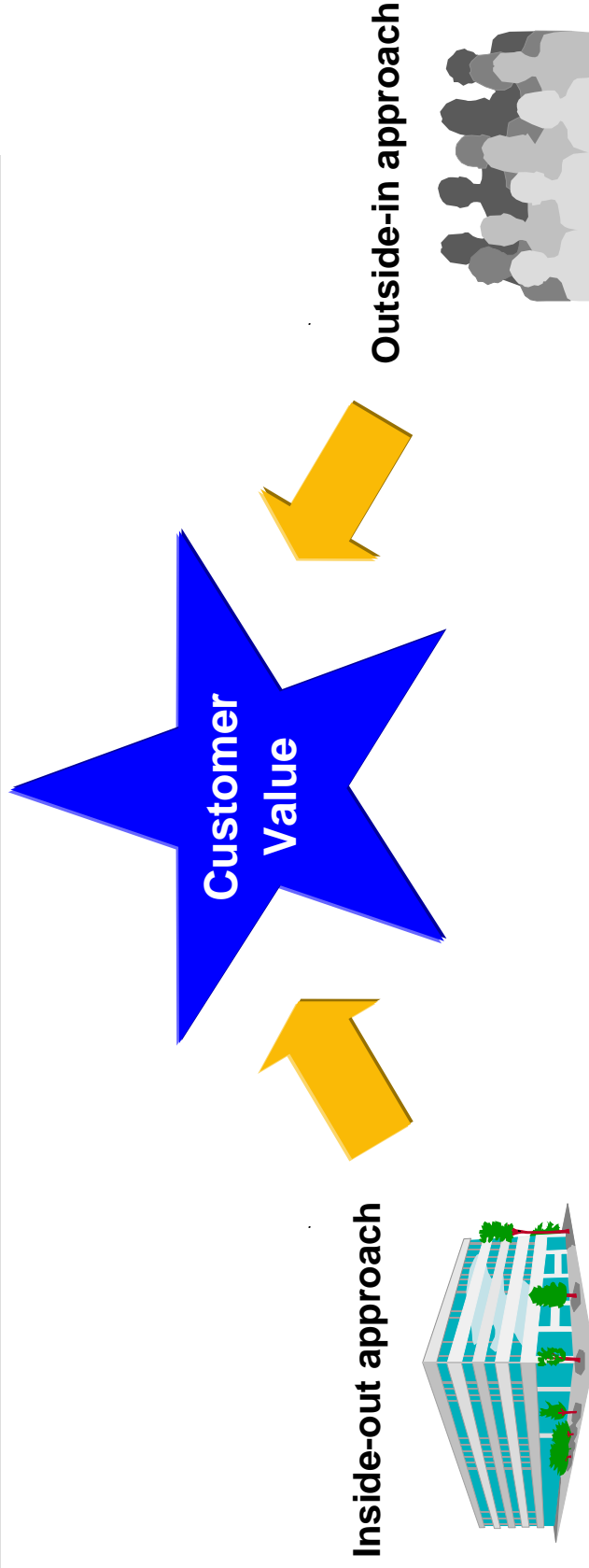


Ensure that members are fully informed and involved at key stages of the programme

- In our experience, authorities that successfully implement customer service transformation programmes have members that:
 - ▶ Champion the cause of customer service on behalf of all citizens
 - ▶ Appreciate that a customer service programme will help transform overall authority performance
 - ▶ Clearly delegate responsibility to the Programme Board
 - ▶ Understand that some benefits take longer than others to occur
 - ▶ Support the contact centre when issues occur and see the change programme through to the end
 - ▶ Talk to the customer services staff both to encourage them and to learn about what customers need from the authority
 - ▶ Give credit where it is due

8

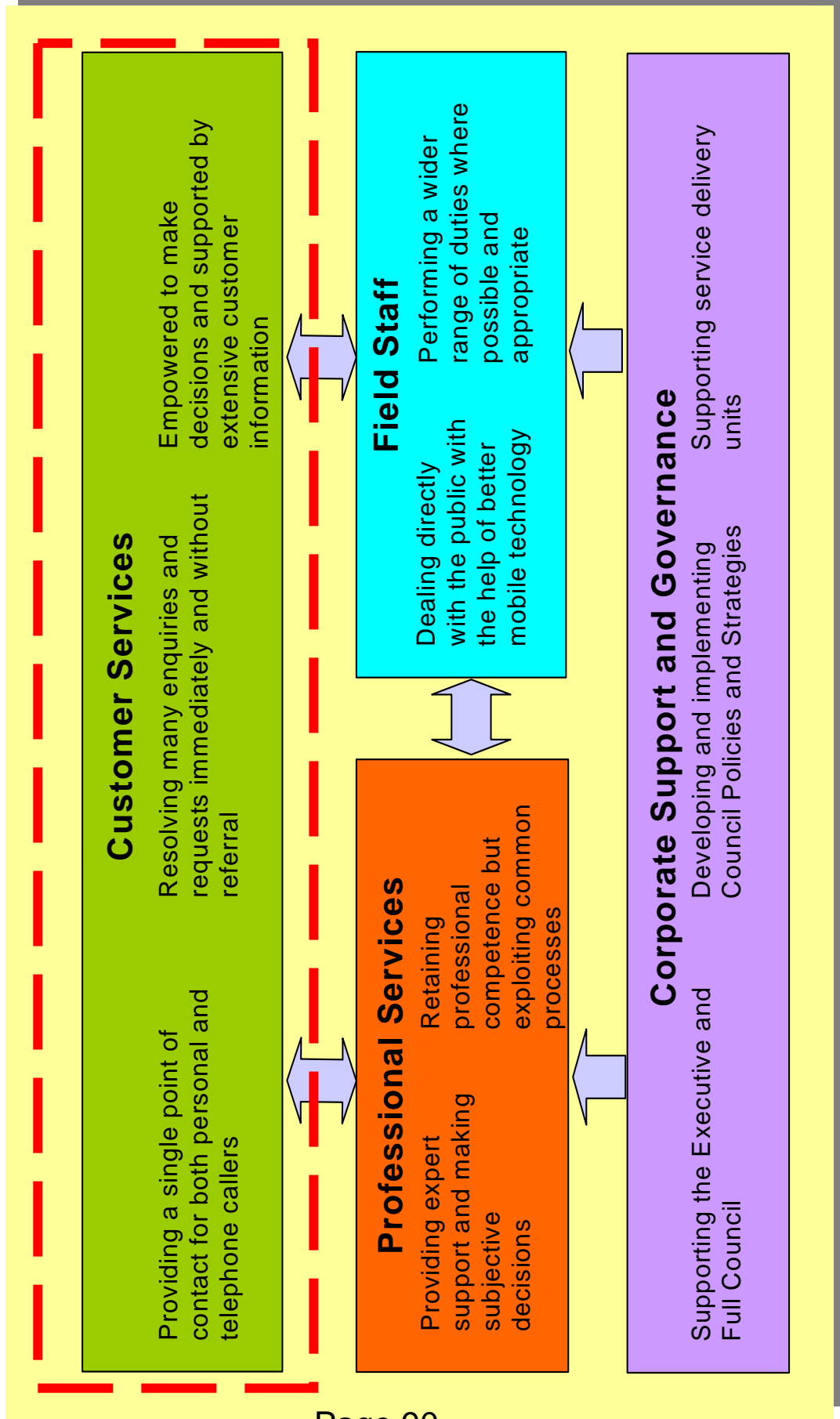
Commission a work package to establish customer needs



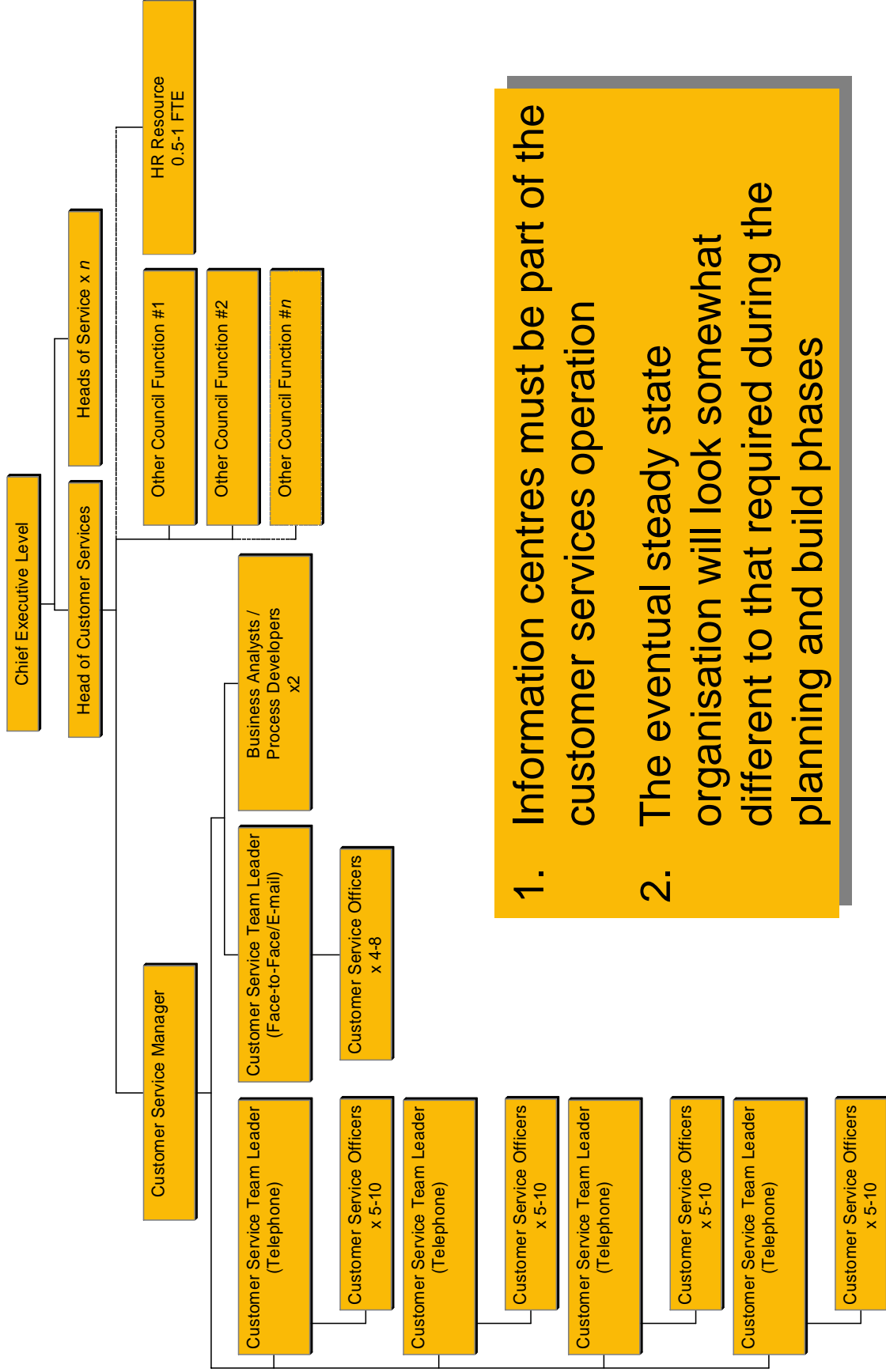
- What you believe is important to your customers
- Your understanding of what your customers value
- What you believe you must do to delight your customers
- What your customers are telling you is important to them
- What your customers are telling you they value from you, the service provider
- What your customers are telling you are basic requirements and what is of ideal value

Listen to the “voice of the customer” (outside-in approach)

8 A customer focused authority typically requires four broad types of job role



8 The customer services operation must be led from the most senior level in an Authority



1. Information centres must be part of the customer services operation
2. The eventual steady state organisation will look somewhat different to that required during the planning and build phases

The Authority's accommodation review must place the customer at the centre of thinking

- Radically improve access to reception and interview rooms
 - ▶ Remove 4 out of 5 receptions at Civic Offices
 - Note: consider the future needs for cash receipting
 - ▶ Consolidate interview room facilities
 - Note: review the need for secure or enclosed interview facilities
 - ▶ Locate on the ground floor at the front of the building
 - ▶ Review satellite facilities in the light of customer needs analysis
- Take account of the requirements of the Disability Discrimination Act
- Linkage / liaison 'Accommodation Working Group' to become ...the 'Customer First Programme' with full Cabinet sponsorship
- Increase the flexibility of staffing and management of customer service resources, by co-locating the Civic Office reception and contact centre next to the Council's 'front door'



Start a work stream to manage the delivery of benefits from the programme

- Define and prioritise the desired benefits
- Set out clear objectives for the programme
- Establish a process to measure progress against objectives
- Embed benefits management in the overall programme

8

Commission a Project Initiation Document

- The Project Initiation Document (PID) is the first step in any professionally managed project
- In order to create a PID, the Project Manager needs to consult with a range of Authority stakeholders
- Production of the PID is a very important task and should be resourced accordingly
 - ▶ Spend sufficient time and resource at the PID stage to anticipate risks, maximise benefits and minimise total project cost

When does a project become a programme? When two or more projects depend on each other to deliver their aims.

Typical PID Contents

- Purpose
- Background
- Project Definition
 - ▶ Brief Description Of Project
 - ▶ Aims and Objectives
 - ▶ Scope, Exclusions, Interfaces and Dependencies
- Outline Deliverables
- Constraints
- Outline Business Benefits
- Project Organisation Structure
- Outline Project Plan
- Project Communication Plan
- Project Controls
- Risk Management
- Project Filing Structure
- Project Budget
- Issues and Risks Log

Appendix 1

Page 95

Telephony data

Erlang.com calculator outputs

Constant demand: 80% answered in under 10 seconds

Call Centre Calculator

Targets and assumptions

Average call duration (s)

Average wrap up time (s)

Call answering target % answered in seconds

Trunk blocking target

Hourly calls and results (Enter number into calls column and click mouse out of box)

Hour	Calls	Avg. delay	Agents	Lines
Hour 1	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 2	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 3	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 4	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 5	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 6	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 7	<input type="text" value="600"/>	<input type="text" value="7"/>	<input type="text" value="36"/>	<input type="text" value="31"/>
Hour 8	<input type="text" value="600"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>

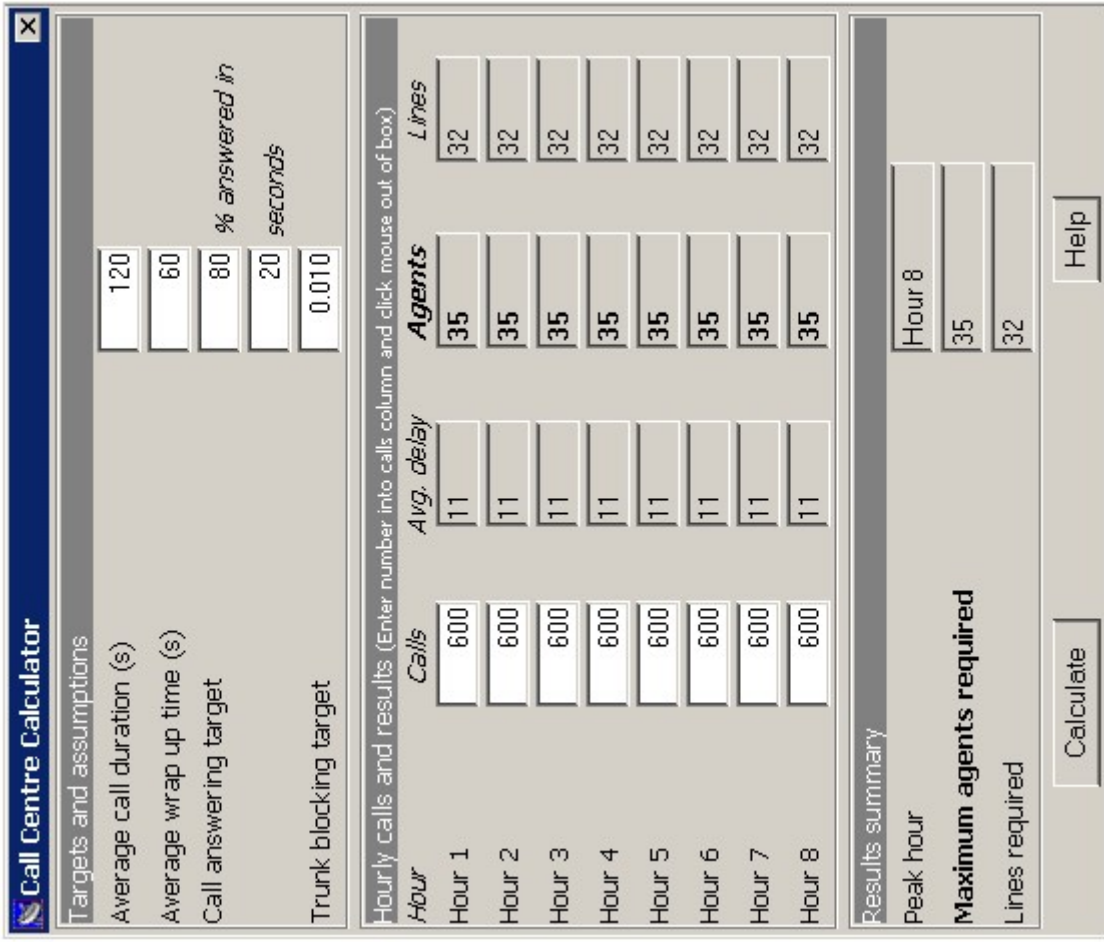
Results summary

Peak hour

Maximum agents required

Lines required

Constant demand: 80% answered in under 20 seconds



Call Centre Calculator

Targets and assumptions

Average call duration (\$)

Average wrap up time (\$)

Call answering target % answered in seconds

Trunk blocking target

Hourly calls and results (Enter number into calls column and click mouse out of box)

Hour	Calls	Avg. delay	Agents	Lines
Hour 1	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 2	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 3	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 4	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 5	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 6	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 7	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>
Hour 8	<input type="text" value="600"/>	<input type="text" value="11"/>	<input type="text" value="35"/>	<input type="text" value="32"/>

Results summary

Peak hour

Maximum agents required

Lines required

Constant demand: 90% answered in under 10 seconds



Call Centre Calculator

Targets and assumptions

Average call duration (\$)

Average wrap up time (\$)

Call answering target % answered in seconds

Trunk blocking target

Hourly calls and results (Enter number into calls column and click mouse out of box)

Hour	Calls	Avg. delay	Agents	Lines
Hour 1	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 2	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 3	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 4	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 5	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 6	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 7	<input type="text" value="600"/>	<input type="text" value="3"/>	<input type="text" value="38"/>	<input type="text" value="31"/>
Hour 8	<input type="text" value="600"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>

Results summary

Peak hour

Maximum agents required

Lines required

Constant demand: 90% answered in under 20 seconds

Call Centre Calculator

Targets and assumptions

Average call duration (s)

Average wrap up time (s)

Call answering target % answered in seconds

Trunk blocking target

Hourly calls and results (Enter number into calls column and click mouse out of box)

Hour	Calls	Avg. delay	Agents	Lines
Hour 1	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 2	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 3	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 4	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 5	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 6	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 7	<input type="text" value="600"/>	<input type="text" value="4"/>	<input type="text" value="37"/>	<input type="text" value="31"/>
Hour 8	<input type="text" value="600"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>

Results summary

Peak hour

Maximum agents required

Lines required

Appendix 2

Page 100

Calculation of unanswered statistics for hunt
groups

As we explained to the Heads of Service, unanswered, unanswering call data requires careful handling. We took a closer look.

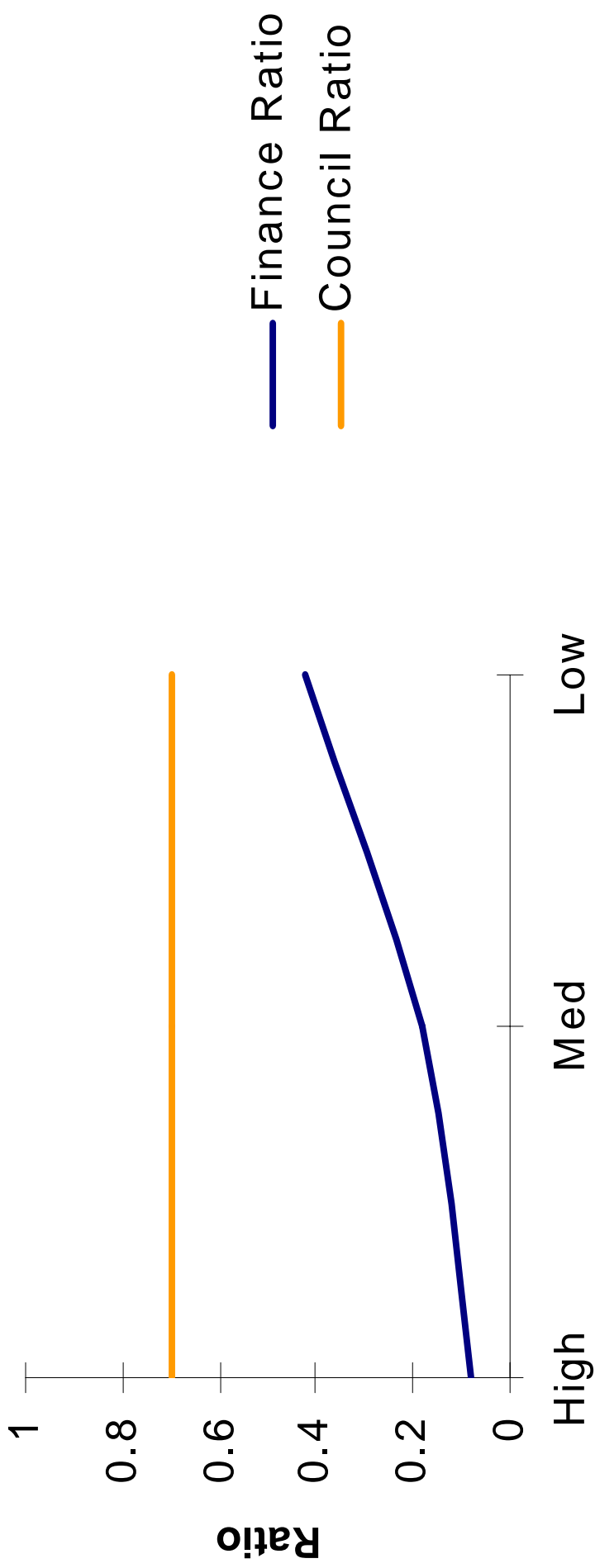
- The effects of hunt and distribution groups were analysed to gain a better understanding of the real number of unanswered calls.
- For each department a sample of 200-300 calls were taken. A single call that generates several hunts is found using the Calling Line Identification (CLI) data.

Source	Dest'n	Switch	Date / Time	Duratio	Ring tim	CLI/OLI/T
T163	E	Civic Offices	30-Mar-05 18:01:18	00:00:15	00:15	Protected data
T163	E	Civic Offices	30-Mar-05 18:01:34	00:00:39	00:39	
T155	E	Civic Offices	31-Mar-05 13:13:08	00:00:15	00:15	
T155	E	Civic Offices	31-Mar-05 13:13:23	00:00:07	00:07	
T155	E	Civic Offices	31-Mar-05 15:20:36	00:00:04	00:04	

Source: Epping Forest District Council Call Logger

- In the above example:
 - ▶ The logger records 5 unanswered calls
 - ▶ We identified 2 hunts each consisting of 2 calls
 - ▶ Therefore the actual number of unanswered calls is 3

Some customers of the Finance service tend to be more persistent in waiting for an answer to their call



Frequency with which a single customer contacts the council

4 The revised data shows a more accurate picture of authority call answering performance

Department	Recorded % of Unanswered Calls	Ratio of Recorded to Actual Unanswered Calls	Actual % of Unanswered Calls
Environment	46%	1:0.8	37%
Planning	45%	1:0.6	27%
Finance	46%	1:0.43	19%
		1:0.08	4%
Housing	37%	1:0.87	32%
HR	38%	1:0.87	33%
ICT	41%	1:0.74	30%
Legal	23%	1:0.75	17%
Leisure	50%	1:1*	50%
Research	37%	1:0.73	27%
Works Unit	30%	1:1*	30%
Average:	39%	1:0.71	31%
		1:0.67	28%

* No hunt or distribution groups identified

Source: Epping Forest District Council Call Logger

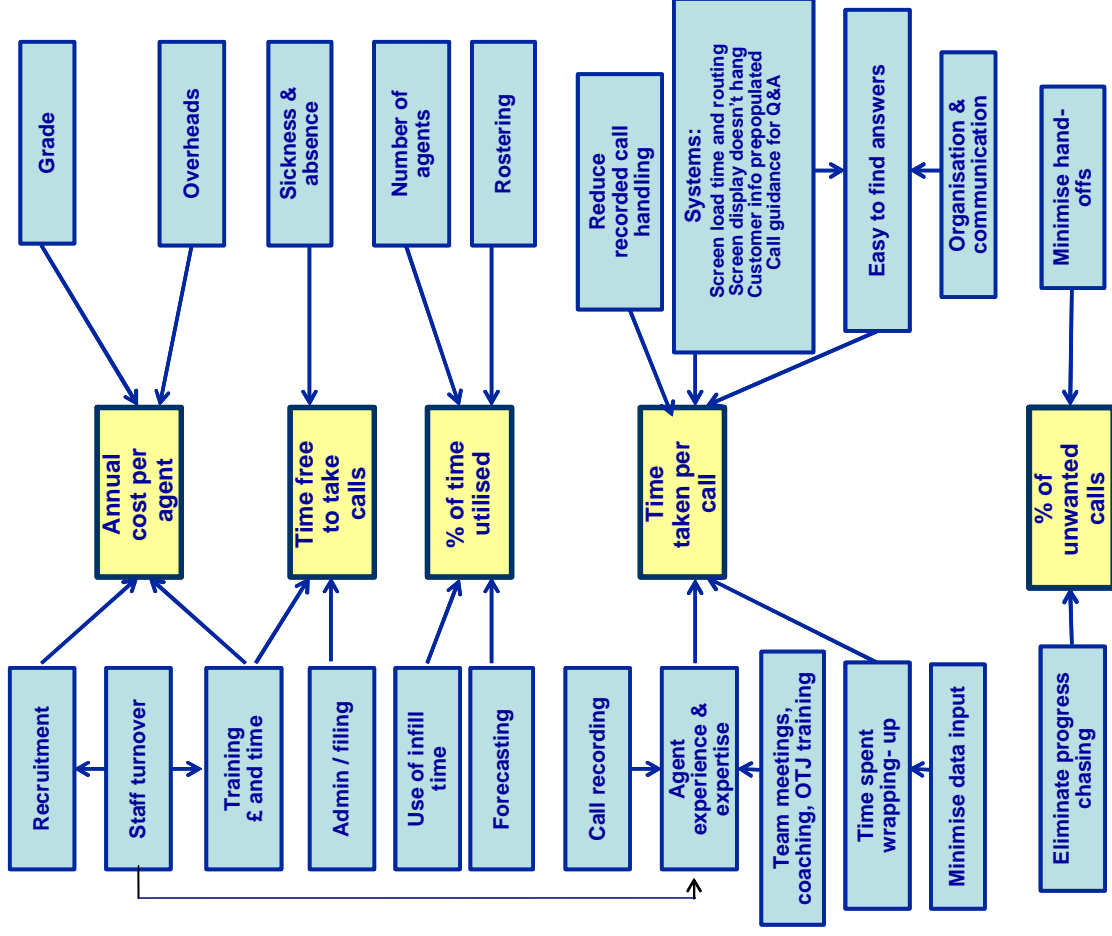
Appendix 3

Page 104

Contact centre operational measures

Contact centre operations management

- Reducing contact handling costs whilst improving capacity
- Many CRM investments start the process with the intention of reducing the costs of call or customer contacts. The theoretical approach shown below is augmented by Steria's knowledge of contact centre benchmarks and experience of contact centre implementation.
- The model from the National CRM Project, shown below, considers dedicated call centres and offices where front-line staff may be spending a significant proportion of their time taking phone calls. It enables Authorities to assess the impact on costs of variations in staff pay; training; turnover; utilisation (and the implications for minimum size of the corporate contact centre); average call duration and unwanted calls.



End of document

Epping Forest District Council Incremental Customer First Programme Phases

Phase 1

Phase 2

Phase 3

Desired Customer Outcomes	Performance Indicator	Target	Period	Performance Indicator	Target	Period	Performance Indicator	Target	Period
* Base figures to be decided	% of calls answered < 10 seconds	75%	Weekly	% of calls answered < 10 seconds	80%	Weekly	% of calls answered < 10 seconds	85%	Weekly
	% of telephone enquiries resolved at first point of contact	50%	Quarterly	% of telephone enquiries resolved at first point of contact	65%	Quarterly	% of telephone enquiries resolved at first point of contact	80%	Quarterly
	% of abandoned calls	20%	Weekly	% of abandoned calls	10%	Weekly	% of abandoned calls	5%	Weekly
	% of customers satisfied with service	Base*	Annually	% of customers satisfied with service	Base +5%	Annually	% of customers satisfied with service	Base+10%	Annually
	Wait time for face-to-face service (minutes)	Base	Quarterly	Wait time for face-to-face service (minutes)	Base-5%	Quarterly	Wait time for face-to-face service (minutes)	Base-10%	Quarterly
	% of face-to-face enquiries resolved at first point of contact	Base	Quarterly	% of face-to-face enquiries resolved at first point of contact	60%	Quarterly	% of face-to-face enquiries resolved at first point of contact	80%	Quarterly
Stakeholder Group Focus	<ul style="list-style-type: none"> Citizen Employee (internal) 			<ul style="list-style-type: none"> Member 			<ul style="list-style-type: none"> Partner Employee (field) 		
Access Channel Enabled	<ul style="list-style-type: none"> Telephone Intranet Face-to-face (Epping Information Centre) 			<ul style="list-style-type: none"> Face-to-face (Information Centres 2 & 3) Email 			<ul style="list-style-type: none"> Face-to-face (Information Centres 4 & 5) Extranet Internet 		
Front Office Operational Characteristics	<ul style="list-style-type: none"> 0900-1715 operating hours 1715 – 0900 Limited out of hours service 15 Generalist staff 10 Specialist staff 2 Face to face staff 1 Contact Centre Manager 			<ul style="list-style-type: none"> 0800-1800 operating hours 1800 - 0800 out of hours service 5 Generalist staff 5 Specialist staff 4 Face to face staff 			<ul style="list-style-type: none"> 0800-1800 operating hours 1800 - 0800 out of hours service 5 Generalist staff 5 Specialist staff 		
Generic Council Functions Supported	<ul style="list-style-type: none"> Receiving and logging contact details Delivering information and advice Fulfilling service requests e.g. sending out leaflets, application forms, correspondence replies, copy bills, receipts and licences. Making appointments for specialist help Dealing with compliments & complaints 			<ul style="list-style-type: none"> Pre assessment of eligibility for receiving a service (initial / simple assessment (rules-based)) Taking / making bookings Consulting and communicating 			<ul style="list-style-type: none"> Complex assessment (knowledge and rules-based) Payments in 		

Epping Forest District Council Incremental Customer First Programme Phases

Phase 1

Phase 2

Phase 3

<p>Council Services Supported</p> <ul style="list-style-type: none"> • Switchboard (ICT) • NNDR (Finance) • Job applications (HR) • Formal complaints (Research & Democratic) • Community Safety requests (Research & Democratic) • Parking (Environmental) • Grounds Maintenance (Leisure) • Conservation, Design & Landscape enquiries (Planning & Economic) • Repairs (Housing) • Right to buy (Housing) • 24x365 Careline (Housing) • Out of hours (Legal, Admin & Estates) 	<ul style="list-style-type: none"> • Council Tax (Finance) • Economic Development (Planning & Economic) • Building Control (Planning & Economic) • Development Control (Planning & Economic) • Land Charges (Legal, Admin & Estates) • Environmental Health & Nuisance (Environmental) • Licensing (Environmental) • Snags/ complaints logging (Works) 	<ul style="list-style-type: none"> • Benefits (Finance) • Waste (Environmental) • Leisure Services enquiries (Leisure) • Member training (Rec) • Committee Minutes • Information Centres • Electoral registration 	<div style="background-color: #f4a460; padding: 5px;"> <p>Factors that affect service area implementation sequence</p> <ul style="list-style-type: none"> ▶ Council priorities / executive direction ▶ Potential for efficiency gains ▶ Call volume vs. contact centre capacity ▶ Seasonality in demand ▶ Resources ▶ Service area process complexity ▶ Back office system complexity </div>
<p>Simulation: detail to be agreed at design stage</p>			
<p>Contact Centre Organisational Transition</p>			

Epping Forest District Council Incremental Customer First Programme Phases

Phase 1

Phase 2

Phase 3

Technical Infrastructure Components	<ul style="list-style-type: none"> • Desktop Environment <ul style="list-style-type: none"> ○ 28 PCs with dual screen • CRM Development/ Environment <ul style="list-style-type: none"> ○ Combined Database/ Application Server x1 • CRM Test/ Training Environment <ul style="list-style-type: none"> ○ Combined Database/ Application Server x1 • CRM Production Server Environment <ul style="list-style-type: none"> ○ Production database servers x2 ○ Application/ web server x2 • Production Integration Server <ul style="list-style-type: none"> ○ LGOL-Net integration server • Telephony Infrastructure <ul style="list-style-type: none"> ○ Upgrade of local Siemens switch to Hi-Path Pro Centre • Local Area Network <ul style="list-style-type: none"> ○ Cisco 2950 Switch x2 ○ Cisco PIXs 515e Firewall ○ Cisco 1721 Router x1 • Various <ul style="list-style-type: none"> ○ 42u Rack & terminal switch x1 ○ SDLT Tape Device ○ Misc Cabling ○ Pack of 20 SDLT tapes x1 	<ul style="list-style-type: none"> • Desktop Environment <ul style="list-style-type: none"> ○ 14 PCs with dual screen 	<ul style="list-style-type: none"> • Desktop Environment <ul style="list-style-type: none"> ○ 10 PCs with dual screen
Application Infrastructure Components	<ul style="list-style-type: none"> • CRM Application <ul style="list-style-type: none"> ○ Full Licences x28 ○ BackOffice Licences x40 ○ Siemens CTI Adapter • Oracle Database <ul style="list-style-type: none"> ○ CPU Licences x2 • LGOL-Net Middleware <ul style="list-style-type: none"> ○ Open source middleware software x1 ○ Back office interfaces x3 • Q-Matic Queue Management System <ul style="list-style-type: none"> ○ Face to face queue system x1 • Microsoft Server 2000 x7 • Backup Exec Server x7 • Norton Antivirus x7 • Support Service for the CRM solution should be based on an SLA of 98.5% availability during the defined working hours 	<ul style="list-style-type: none"> • CRM Application <ul style="list-style-type: none"> ○ Full Licences x14 ○ BackOffice Licences x30 	<ul style="list-style-type: none"> • CRM Application <ul style="list-style-type: none"> ○ Full Licences x10 ○ BackOffice Licences x30

Epping Forest District Council Incremental Customer First Programme Phases

Phase 1

Phase 2

Phase 3

<p>Key Assumptions</p> <ul style="list-style-type: none"> Release 1 will focus on a broad & shallow implementation of CRM, using the switchboard teams as the nucleus. The contact centre will be located at the Civic Offices in Epping. Customer Service Officers will be employees of the Council. The Authority wishes to build expertise in business process improvement and CRM software scripting. Epping information centre to be CRM enabled with a queue management system and staffed by 2 FTEs. Specialist assessments and direct services will always be handled in the back office. The Front Office agent will own the full life-cycle of customer contact management The technical infrastructure will be based in Epping Forest District Council Computer Room The Authority has implemented an intranet based FAQ/ EAQ Engine and an industry standard electronic forms application If there is a business case, the solution may include integration with carefully selected Authority back office systems No account is taken for any Authority costs associated to redundancy or staff re-deployment 	<ul style="list-style-type: none"> Release 2 will focus on adding further service areas to the Contact Centre. Release 2 will focus on improving the quality of end-to-end service to customers through activities such as <i>Customer Circles</i>. The Authority wishes to benefit from knowledge transfer, so that by Release 3 it will be largely self sufficient in terms of: <ul style="list-style-type: none"> Adapting the CRM system as business needs evolve; Business process improvement Remaining four information centres to be CRM enabled (no queue management system) A review workshop after each release will enable the Authority to learn lessons and improve subsequent implementation work. The Authority has implemented an internet based FAQ/ EAQ Engine. Self-service access to customer accounts is out of scope. 	<ul style="list-style-type: none"> Release 3 will focus on creating an integrated front office team with a second tier of specialist caseworkers. Reinforcement of excellent customer service behaviour will occur in Release 3 to ensure that the whole Authority adheres to the required standard.
<p>Key Dependencies</p> <ul style="list-style-type: none"> Availability of approx 350 m² office space with 25 agent positions plus 6 further desks. Availability of 0.5 FTE Authority HR professional to provide a redeployment and recruitment service. Availability of 2 FTE Authority business analysts/process developers Establishment of an Authority wide '<i>Customer First</i> Implementation Team' to carry out project activities under the direction of the '<i>Customer First</i> Programme Board' 	<ul style="list-style-type: none"> Availability of additional agent and desk positions to accommodate staff. The Authority email system will be used for in-bound and out-bound email The Authority email system will be used for appointment bookings. The availability of Information Centres and the requisite network capacity. 	<ul style="list-style-type: none"> Availability of additional agent and desk positions to accommodate staff.