

My Account Detailed Matrix FINAL - Transformation Programme: Phase 2

No.	Requirement	Agilisys	Notes	ANO	Notes	ANO	Notes
1	Customer Golden Record						
1.1	Does the system allow for the creation of a Customer Golden record?	✓		✓		✓	
1.2	Does the system allow the Customer Golden record to be accessed/updated and used by the authority in Real time?	✓		✗		✗	
1.3	Are fields held against the Customer Golden record customisable and can be added/removed whenever required?	✓		✗		✗	
1.4	Can MBC add and remove these fields when required?	✗		✗		✗	
Score	Sub-Section Score (1 point each item)	3		1		1	
2	Registration						
2.1	Can the registration process be customised in terms of the data captured?	✓		✓		✓	
2.2	Can the registration process be customised to utilise back officer vendor API's based in data captured? (e.g. Set up eBilling)	✓		✓		✗	
2.3	Can the customer be authenticated upon registration with no staff involvement?	✓		✓		✓	
2.4	Single factor registration - no delay in customer accessing online account and all available services	✓		✓		✓	
Score	Sub-Section Score (1 point each item)	4		4		3	
Total Score	Registration & Authentication - Max available score = 8	7		5		4	
Weighting		10%	8.93	6.38		5.10	
3	Reporting and Analysis						
3.1	Can the Customer golden record data and all customer references be exported from the system for analytical purposes?	✓		✓		✓	
3.2	Does the system have a reporting suite available that reports on customer use of all areas of the My Account platform?	✓		✗	Future Development	✓	Basic - however will be expanded. On road map.
3.3	Enhanced digital analytics - Export of transaction history tied to customer (sequel data)	✓		✗		✗	
Score	Sub-Section Score (1 point each item)	3		1		2	
4	Online Transaction History/Integration						
4.1	Once the Customer has submitted a service request is there an area where this request can be viewed?	✓		✓		✓	
4.2	Can this progress on resolution be tracked using the same interface to view the service request if not resolved?	✓		✓		✗	
4.3	Can assisted service requests be viewed and progress tracked using the same interface?	✓		✓		✗	
4.4	Can a footprint of the customers activity be passed to the internal CRM system?	✓		✗	CRM integration is possible but not been delivered, use of Archieve Service recommended.	✓	
4.6	Is there an integration method available (i.e. Web Service/API) to populate the Customer's My Account transaction history with services delivered outside of a digital platform?	✓		✗		✗	
Score	Sub-Section Score (1 point each item)	5		3		2	
Total Score	Digital Transaction History (population & analysis) - Max available score = 8	8		4		4	
Weighting		10%	10.21	5.10		5.10	
5	Pre-packaged forms						
5.1	Does the account provide pre-packaged processes for the following service areas? (As per the 'My Account' document)						
5.1.1	Council Tax						
5.1.2	Additional service registration	✓		✓		✓	
5.1.3	View Council Tax Account	✓		✓		✓	

5.1.4	Apply for discounts	✓		✓		✓	
5.1.5	Set up and amend direct debit	✓		✓		✓	
5.1.6	Change of Address - (Move in/Move out/Move within)	✓		✓		✓	
5.1.7	Set up direct debit	✓		✓		✓	
5.1.8	Customer validated with no staff intervention	✓		✓		✓	
5.1.9	Validation method is secure and acceptable	✓		✓		✓	
5.2	Benefits						
5.2.1	Additional service registration	✓		✓		✓	
5.2.2	View Housing Benefit Account	✓		✗	Not Live	✓	
5.2.3	View Council Tax Support Account	✓		✗	Not Live	✓	
5.2.4	Entitlement calculator	✓		✗		✗	
5.2.5	New Claims	✓		✓		✓	
5.2.6	Change of Circumstances	✓		✓		✓	
5.2.7	Customer validated with no staff intervention, Validation method is secure and acceptable	✓		✓		✓	
5.3	Can progress be tracked and updated (via CRM or back office system) once pre-packaged process has been submitted within the Online Transaction History?	✓		✗		✗	
Score	Sub-Section Score (1/2 point each item)		8		6		7
5.4	Confidence level (scale of 1-10) in suppliers being able to deliver API integration		10		1		6
Total Score	Revenue & Benefits - Directly Integrated Package APIs - Max available score = 18		18		7		13
Weighting		23%	22.97		8.93		16.59
6	Federation & E-form integrations						
6.1	Can the system provide facilitated access to the Jadu Marketing module to allow customers to select their interests & receive updates when new content is available?	✓		✗	Not delivered, but possible. Only achieved single sign on with a leisure system.	✗	Not costed in proposal
6.2	Can the eForms package be pre-populated with Customer data held on the Customer's Golden record?	✓		✓		✓	
6.3	Can the systems be integrated with a 3rd party eForms package?	✓		✓	Own eForms product	✓	
6.4	If so, can the 3rd party eForms package be pre-populated with Customer data held on the Customer's Golden record?	✓		✓	Own eForms product	✓	
6.5	if so, can the service requests using 3rd party eForms package be made available to view and check progress in the Online Transaction History?	✓		✓	Own eForms product	✓	
6.6	Can the system provide Single Sign On/Federated access in to 3rd party portal systems? (Such as eRevenues/eBenefits)	✓	Uses shibboleth attributes.	✗	Do not use shibboleth attributes.	✓	Can be done with any system that uses OpenAuth Standards.
6.7	Is this maintained by supplier?	✓		✓		✓	
Score	Sub-Section Score (1 point each item)		7		5		6
7	E-Documents Link						
7.1	Does the system have the facility to display Customer related documents held on our Corporate EDM system? (IDOX)	✓		✓		✗	Have integrated with other EDM systems but not idox. Use internal document store as standard.
Score	Sub-Section Score (1 point each item)		1		1		0
Total Score	Federation & wider Integrations - Max available score = 8		8		6		6
Weighting		10%	10.21		7.66		7.66
8	Assisted Access						
8.1	Live Chat	✓		✗	Not developed, but possible.	✗	

8.2	CSA Assisted Service Module	✓		✓	Achieve Service module required	✓	
8.3	Can product be used by CSAs	✓		✓		✓	
8.4	Can product be developed to meet our future needs	✓		✓		✓	
Score	Sub-Section Score (2 points each item)		8		6		6
Total Score	Assisted Access - Max available score = 8		8		6		6
Weighting		10%	10.21		7.66		7.66
9	Digital Channel Shift (adoption)						
9.1	Enhanced Digital Analytics Tools	✓		✗		✗	
9.2	Refine digital access & services through analytics	✓		✗		✗	
9.3	Direct experience in delivering channel shift strategies	✓		✗		✗	
9.4	Skills and knowledge transfer included in core proposal	✓		✗		✗	
Score	Sub-Section Score (2 points each item)		8		0		0
Total Score	Channel Shift Support - Max available score = 8		8		0		0
Weighting		10%	10.21		0.00		0.00
10.0	Confidence level (Scale from 1-20) in suppliers ability to deliver current and future phases in partnership with MBC - Max available score = 20		17		3		15
Weighting		26%	22		3.9		19.5