

APPENDIX A
Project Documentation

'My Account'

**Incorporating business case, project
brief and project management
document**

- Part A – Document Control**
- Part B – Business Case, Project Background and technical issues**
- Part C – Project Brief**
- Part D – Project Management Document**

Version no: 1

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Part A - Document Control

A 1 - Key personnel

Title	Project Initiation Document
Author	Christian Coltart
Approver	Keith Aubrey
Owner	Christian Coltart

A 2 - Project Organisation Structure

The 'My Account' solution implementation sits within the Transformational Change Programme structures. Components of the product implementation will be split off into a number of projects to be delivered in phase 2 of the Transformational Change Programme.

The main roles and responsibilities to be allocated by Programme Board to the projects will include:

- Project Sponsors
- Project Managers
- Service Leads (R&B)
- System Analyst
- CRM Development
- Digital Engagement
- Customer Insight
- Process specialist
- Steria Ltd
- Solution Supplier

A 3 - Version history

Version	Date	Summary of changes	Changes marked
V0.1	28/02/14		

A 4 - Distribution

Name	Area
Management Team	

A 5 - References

Doc reference	Document title

Part B – Business Case, Project Background / technical issues

B 1 - General

The 'My Account' initiative was borne out a business need to automate the authentication of customers and provide a coherent digital offering to them. Allowing transactional services to be provided online in a joined up way, driving adoption of digital services and allowing end-to-end integration to deliver efficiencies.

This followed from investigations into data matching which concluded that due to the multitude of data formats and therefore the resource implications of matching customer records from back office systems the initial cost was prohibitive and on-going maintenance problematic.

The Transformational Change Programme has moved from data matching all customer records we hold in key systems to customers who sign up for 'My Account' providing the contextual relationships to the data we hold on them in the back office systems.

'My Account' allows us to break the historical and existing silos of service delivery, providing a more coherent service offer with integration into back office systems. Delivering a single point of access, coordination across platforms or portals and access for customer to view their online activity. All of which drives up confidence in digital and supports their retention in the digital space.

B 2 –Service / Service / Function

All services with priorities driven by a mix of customer demand, cost to deliver and complexity of the service being delivered.

B 3 – Strategic fit

- Supported by the Digital-by-Default strategic business case.
- Delivers the transactional self-serve infrastructure on which to develop online processes.
- Provides a single sign on for customers and allows the contextual links to back office systems to support integration developments.
- Simplifies the digital offering for customers by delivering a single platform from which customers can transact removing organisational and supplier silos.
- Retains customers in the digital space to support and drive efficiency targets.
- Alignment to the wider Transformational Change developments, initiatives and investments.

- Supports the delivery of channel shift and efficiency savings associated with the Transformational Change Programme.
- Provides an assisted route to support customers in accessing digital services.

Critical Success Factors:

Of the 80% of Customer Services demand targeted:

- 1- 50% of the service interactions have a digital offering by the 1st April 2017.
- 2- 40% of telephone, 15% of Face2Face and 100% of email interactions are reduced or re-directed to digital by 1st April 2017.
- 3- £200k of revenue savings are released by 1st April 2017.

B 4 - Options appraisal**Options 1-3**

- A robust mini competition has been undertaken with those suppliers short-listed for evaluation within the G-Cloud procurement framework. A scoring matrix outlines three suppliers who were evaluated. This forms the options appraisal for three of the options and outlines the alignment to the business needs. With Agilisys successfully winning the mini competition and securing the bulk of the scores available they form the recommended supplier and the proposed option to which this business case relates. The key factors for this decision were alignment to our business need, confidence in the delivery of integrated services for revs and bens, understanding of our digital vision and strength of the partnership solution.

Option 4

- A fourth option is not to invest in 'My Account' and proceed along the route of customers navigating a number of login and authentications to access portal solutions developed in the professional silos. This option is not proposed following a trial of the portals as part of the Universal Credit Pilot. These portals were within revenues and benefits and their limitations outside of the multiple logins for customers were that they were not customer focused having been developed in professional silos. Therefore adoption by customers has been limited and roll-out to self-service constrained. This in turn does not support the aims of the Transformational Change Programme and the vision for digital services, hence why this option is not recommended.

Option 5

- A fifth option is to do nothing at all and review the validity of the Transformational Change Programme and its core objectives. This option would not move the Council forward and would leave it poorly placed to take advantage of the significant benefits that digital will bring in the future.

Project Matrix & Recommended Supplier

- When reviewing the concept of My Account against the project scoring matrix it scores highly. (see section B9)
- The recommended option is to go with the Agilisys proposal which it is worth highlighting also provides a potential income stream for the council of 10k pa for each additional district council which adopts and remains committed to the solution with support from Melton as a reference site.
- The procurement approach will be to purchase the recommended suppliers solution from the G-Cloud framework.

B 5 - Achievability

The solution was subject to meeting the budget as outlined within the project mandate but the decision on which supplier to select was based 100% on quality criteria.

A robust and extensive mini competition has been undertaken with short-listed suppliers with a proportion of the scoring within the scoring matrix subject to confidence levels of the evaluation team. These confidence levels were drawn from assessments of the supplier's strengths as demonstrated from contact with reference sites, presentations and the suppliers responses to the technical requirements.

The evaluation team was formed from the Customer Services Manager, ICT Client Manager and Change Manager who agreed the levels of confidence in each of the short-listed suppliers.

The focus when evaluating the levels of confidence focused around the suppliers ability to deliver both the core products within their solutions and support the wider outcomes of the programme both for phase 2 and beyond. Therefore the matrix score of over 90% for the recommended supplier (see scoring matrix) provides a guide to the achievability of the project in the opinion of a core team of managers within the programme. This opinion has also been endorsed by the Transformation Board which is made up of Project Sponsors, managers and resources in the programme.

B 6 - Legal Issues (if applicable)

Welland Procurement has provided support within the procurement process and the approach to purchasing of the solutions through the G-Cloud framework.

B 7 Specification

See business requirements/needs as outlined in the scoring matrix.

B 8 - Financial Implications

Cap / Rev – Preferred Option - Agilisys		
	£	Comment
Initial Costs	85k capital	
External Funding	n/a	
Net Cost*	85k pa	
On-going costs/Savings**	200k (contribution to) £40k ongoing software costs	Overall saving from the whole programme of which this element is just a part. On-going revenue costs of £40k to be met from £30k reduction in establishment and £10k included in the revenue budget for 2014/15.
Phasing		

***Potential income stream of £10k pa for each additional district council we help Agilisys to bring in and adopt the solution could fund the on-going revenue costs.**

****On-going savings forms one of the outcomes from the Transformation Change Programme as a whole and a combination of products delivered within the projects at different phases support this outcome. The detailed measurement of savings will sit within the Digital Services projects in phase 2 and beyond.**

B 9 – Project Scoring Matrix

Scoring – for your project – calculate the points			
Criteria	1 Point	2 Points	3 Points
Cost £ (budget, time and human resource)			>£50K
Timescale			> 12 months
Impact if project failed on the organisation			Major
Melton's Track Record			New Area of Working
Stakeholder Interest (internal and external)			Major
Project Complexity			Highly Complex

Projects scoring 6 – 10 points - Formal methodology not necessary
Projects scoring > 10 points - Formal methodology is necessary

Note

The business case must be submitted initially to the Programme Board and will allow schemes to be prioritised and feasibility to be assessed.

Part C – Project Brief

The Project Brief sets out the direction, scope and objectives of the project and forms essentially the “contract” between the Project Sponsor and Project Manager as to what will need to be delivered.

C 1 - Project Objectives, outcomes and benefits

- Authentication of customer transacting online.
- Single digital registration for customers.
- Develop a master customer record on which to build integrations into back office systems.
- Deliver the technical architecture on which to build up a customer’s digital transaction history.
- Deliver an assisted digital portal for authority staff and approved third parties to support customers accessing digital through alternative channels. (AD Contact).
- Integrate with NorthGate back office system using the APIs. Delivering a package of transaction processes for revenues and benefits.
- Maximise the potential of the technology in scope.

Part D – Project Management

D 1- Key Business Risks/Contingency Plans/Exit Strategy

- 1- Integration to the back office system
- 2- Meet implementation timetable
- 3- Commitment to work with us
- 4- Integration to e-forms package

D 2 - Key Stakeholders

This section should identify the key stakeholders, both internal and external to Melton Borough Council, for example:

External Stakeholders

This area to be developed once the recommended supplier is approved and project manager appointed.

Internal Stakeholders

This area to be developed once the recommended supplier is approved and project manager appointed.

***For guidance on their management strategies refer back to Step 2 –
Prioritisation, page 16***

D 3 - Communication Plan

This area to be developed once the recommended supplier is approved and project manager appointed. Elements will draw on the Transformational Change Programme promotional plan.