'My Account'

Agenda item number: **6**
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Meeting: PFA Committee

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Report by: Christian Coltart

Service : Communications

Job title: Change Manager

Status: Pending PFA Approval

Subject:: My Account

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1   Purpose of report

To outline the proposal for developing a digital 'My Account' offering to customers which delivers the authentication of customers and enables the automation of customer data input through integration.

Providing an overview of the progression towards a 'My Account' solution in order to overcome internal development barriers and join up a raft of existing back office systems across the Council

An outline of the proposed solution and an initial assessment of the options being investigated will be communicated in order that Programme Board can inform this work or mandate a preferred direction.

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2   Recommendations

1- It is recommended that the capital investment of £85k to develop a digital 'My Account' for customers accessing our services online is approved for inclusion in the capital programme.

2- It is noted that the anticipated on-going net revenue commitments for 'My Account' can be accommodated within the 2014/15 budget.

3.1   This report formally captures the shift from a data matching exercise to delivery of a 'My Account' solution. Data matching has formed part of the programme going back to delivery of the CTS pilot whereby we undertook to data match the UCP cohort. Within the pilot this served to target communications around the likelihood to self-serve and to allow the active tracking of which customers had undertook the review.

3.2   This activity was recorded in Committee reports to Policy Finance and Administration (PFA) going back to December 2012. Alongside Programme Board reports going back to January 2013, with concerns in relation to the relative success and extensive resource inputs for this activity recorded for the first time at Programme Board in March 2013.

3.3   As the Programme moved beyond the successful delivery of the CTS pilot and the end of Phase 1 the lessons learnt captured further issues in relation to data quality and its impact on successful data matching between systems.

3.4   At this stage the internal thinking was that it is data matching which underpins the integration and digitalisation of processes. So at the time of reporting to PFA in July 2013 data matching and personalisation had been linked as activities which underpinned the contextual relationship of 'who the customer is' across internal data sources. Following engagement of a leading data matching supplier, Multivue, initial costs were available at this stage for investments in the technical architecture to support data matching between three systems. The system costs excluding any resources within the programme to deliver the system and services to assist with matching records was circa £50k.

3.5   It was not until the Phase 1.5 programme planning workshop in August 2013 that data matching was challenged in relation to not all customers in our systems will opt for a digital service. In fact the proposition was many customers never contact us at all through any channel so why enable the matching of data for all customer records. Through this challenge customer registration and authentication become the element which technically underpinned the integration and digitalisation of processes. With us moving to the customer providing, at the point of registration, the contextual relationships to the data we hold on them in our back office systems.

3.6   Alongside this shift in focus on how the contextual relationships of the customer in our systems was achieved it was becoming evident that the landscape of digital offerings to our customers was silo based. So it was clear from the release of solutions for revenues and benefits and our knowledge of other online portals such as planning portal that these products were developed in silos and presented themselves to customers in this way. Therefore providing no single point of access, no coordination across platforms or portals and no access for customers to view their online activity. All of which would be needed to provide customers with

the confidence in digital solutions and allow their retention in the digital space. 'My Account' was borne out of a consideration of these challenges and barriers. With the development team, led by the Change Manager developing a pictorial representation of what 'My Account' may look like in October 2013 (see Figure 1).

Figure 1

Transformational Change Programme 2013
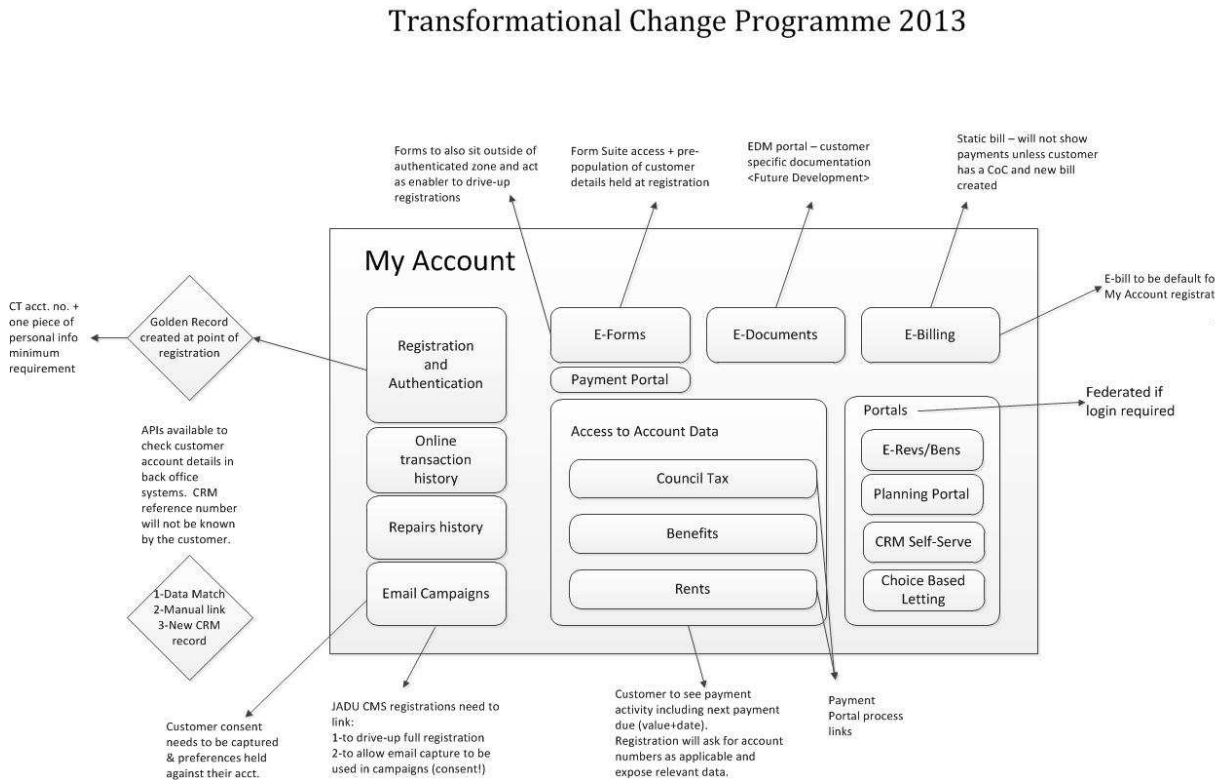
3.7 Figure 1 has been used to determine both the potential of the market to deliver such a solution and its relative cost. This analysis and evaluation through the procurement process will be presented in the business case. With a firm recommendation supported by the Transformation Board.

4	Legal, financial and IT implications

A full assessment of costs will be undertaken for inclusion in the Business Case.

All of the solutions have been assessed alongside our ICT Client Manager at Hinckley, allowing for any wider ICT implications to be identified and included within the assessment.

Wider than specific considerations for the My Account infrastructure but as the up-take of digital grows the reliance of our customers linking to the servers at Parkside to allow self-service will require consideration to greater resilience and up-time.

5	Initial Assessment of risk

A full assessment of risk will be undertaken as part of the business case with the outlook on risks differing depending on the supplier chosen to help us deliver our My Account infrastructure.
An example of some generalised risks without a rating at this stage would be:
- Solution is not customer centric/simple and so is not used.
- Does not deliver integration into our back office systems.
- The standards upon which other customer portals (i.e. Choice Based Lettings) are built are not compatible or aligned to central government prescriptive standards.
- Customer histories in the digital space do not allow a full picture of progress and activity for the customer and confidence is low leading to calls.
- The solution in not flexible to our/our customer needs.
- The investment does not help to deliver our digital ambitions or targeted savings.
- The solution does not support our customer facing staff to assist customers to use the digital channel.
- We lose the customer centric data analysis which we have been able to deliver through our CRM system.
- The solution does not provide a broad enough offering to customers to encourage adoption and deliver against their digital self-serve demands.
- We are unable to bring along our strategic ICT partners in adopting a single unified platform across Leicestershire.
- We are unable to deliver a business case to expand the solution to deliver a wider breath of services in the future.
- The solution does not seamlessly link into our dynamic forms solution.
- The solution does not seamlessly link into our new Content management system.
- Customer relationship management is diminished as another platform/channel for delivery is opened up to the customer.
- The necessary culture change within the organisation to exploit the opportunities of a My Account solution and enact a digital first philosophy from officers fails.

6	Equalities and diversity and staffing implications

'My Account' would need to include an assisted element in order that no customers were disadvantaged in not being able to access this digital offering. An EIA will be developed as the option is refined and a supplier is selected to work more closely with.

Staffing implications are considered at a Programme level and managed through the Head of Communications.