

# Business Case

## Part A - Document Control

### A 1 - Key personnel

<b>Project</b>	Customer centric systems
<b>Sponsor</b>	Keith Aubrey: Deputy Chief Executive
<b>Project Manager</b>	Dave McKenlay

### A 2 - Version history

<b>Version</b>	<b>Date</b>	<b>Summary of changes</b>	<b>Changes marked</b>
1.0	30.10.18	None – first version	

### A 3 - Distribution

<b>Name</b>	<b>Area</b>

## Part B – Project Background/Overview

### B 1 – Background to the Project

Melton Borough Council (MBC) currently has the following customer centric IT systems (excluding contact centre telephony which has been addressed)

- CRM
- IDOX Electronic Documents Management (EDM)
- Workflow (Customer enquiries routing and SLA escalations e.g. FOI)
- ECINS (Customer case management)
- Achieve Forms (Electronic forms used internally and for self-service)
- CMS (Website)
- My Account / Customer Authentication / BECS – Benefits New Claims and Change of Circumstances
- Northgate Revs and Bens (Council Tax and Benefits)
- Northgate Housing (Rents and repairs)
- Abritas – Choice based lettings (Housing allocations)
- Sentinel (Anti-Social Behaviour)
- Idox Uniform (Waste and Environment Health service requests)

The CRM system is no longer supported, cannot be updated or amended and is consequently at risk of failure.

We have also recently learnt that the My Account system will cease to be supported after March 2020.

Evidence suggests that we may not be using some, or all, of the other systems to their full extent or capacity/capability. It is also likely that there is duplicate functionality within these systems.

The current systems do not provide a single view of the customer, do not integrate and do not provide quality data for analysis.

It is therefore clear that action is required to both implement replacements for My Account and possibly for the CRM system (at this stage the extent to which we may require a “full” CRM replacement is unclear).

The **Customer centric systems review** project will review our current system usage and look at the capacity and capability of our systems. The outcome will be significantly improved customer centric services. The project will identify elements that can be taken forward straightaway, for example the implementation of an updated document management system or if small adjustments to existing systems would make a significant difference and, if appropriate identify larger scale changes that will be the subject of a further business case.

Funding (£80k) is required for system acquisition and implementation. It is also possible that the project may need to secure specialist technical advice

during the course of the review. However, the project will endeavour to manage these revenue costs from within existing budgets.

## **B 2 –Key Service Areas Affected**

All customer facing services (information and advice as well as transactional services) will be affected. In addition it is possible that a new or revised system may have the potential to be of value to other parts of MBC, for example the adoption of the Information at Work document management system.

## **B 3 – Strategic fit**

The Customer centric systems review will contribute to the following priorities in the MBC Corporate Plan:

- Delivering quality services to business and residents, understanding what matters to our customers; and
- Maintaining a personal approach, but harnessing appropriate technology to make our services more accessible and fit for the digital economy.

The project will provide an opportunity to identify a solution that will improve how customers are served by MBC staff and customers' ability to self-serve. The project will also identify "quick win" elements for procurement and implementation.

The principles driving the review are:

- People will choose to conduct their business with MBC via on-line self-serve
- All interactions, whether self-serve or by an MBC agent on a resident's behalf, will be conducted using a single point of access
- The single point of access will provide a seamless view in a single corporate style (irrespective of what happens in the background)
- The single point of access integrates with "back-office" systems (removing or reducing the need for re-keying of information)
- Wherever possible processes are fully automated (removing the need for human intervention)

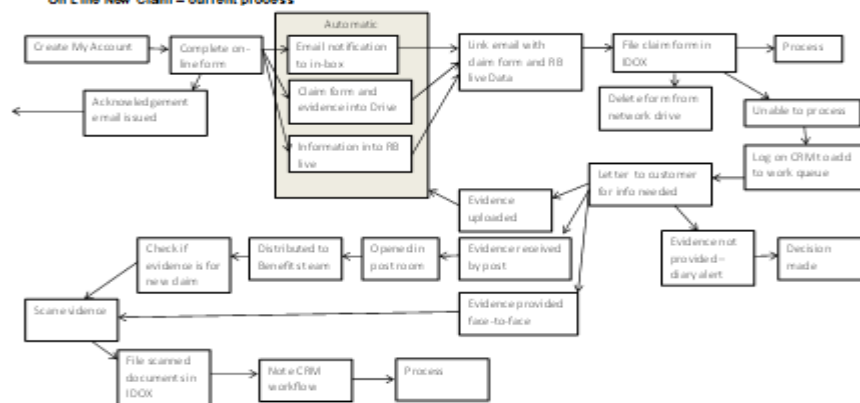
With Revs and Bens workflow management currently contained within the unsupported CRM system it is important that this element is tackled urgently. Adopting Information at Work (IoW) will provide a document storage facility and integrated workflow management for Revs and Bens. In addition IoW will provide statistical "count" data that is currently counted manually and recoded via a spreadsheet.

IoW will, for example significantly reduce the steps involved in a Housing Benefit new claim (see below process maps – the first is the current process and the second is the revised process). Many of these steps are actions carried out by processors. Removal of these steps will result in a saving of staff time.

**On Line New Claim – Ideal process (potentially facilitated by Information at Work)**



**On Line New Claim – current process**



Objectives for the project are:

- Acquisition and implementation of front facing systems that will work effectively together to meet business needs.
- To identify system business needs to support self service and assisted self service with a view to improving productivity:

#### **B 4 - Options appraisal**

Given that the CRM system is no longer supported and continued use represents a risk and that current systems do not support (as currently used) a significant shift to self-serve there isn't in effect a "do nothing" option.

However, in terms of meeting the business needs this project represents the first stage of a process. Completing the project will provide the options appraisal that will contribute to a full business case for the chosen solution.

The project will:

- Assess the capability and capacity of our existing systems
- At the same time develop a broad specification setting out our requirements
- Test the specification against the current systems' capabilities
- Test and refine the broad specification
- Decide on the appropriate course of action
- Identify small scale elements that can be taken forward immediately

Delivery of the project should lead to cashable savings arising from:

- The provision of better information that will remove some of the current customer demand
- Reduced demand brought about by channel shift (the move to self-serve)
- The remaining demand is easier to deal with by MBC staff using more streamlined systems

Further "soft" benefits include:

- A better customer experience (better accessibility, better functionality, easier to use interfaces and greater reliability)
- Improved reputation for MBC (positive feedback on self-serve functions, better customer service, less delays)
- Employee satisfaction and motivation

#### **B5 - Key Business Risks/Contingency plans**

Current risks are around:

- The project not going forward (given that, for example, CRM is no longer supported, systems do not support a significant move to self-serve).
- Sufficient staff, with appropriate skills being available

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**B 6- Financial Implications**
**Cap / Rev**

*Please define if these are capital or revenue and the financial years they will be incurred. Also consider if they are Special or General Expenses or HRA*

	£	£	£	£	Comment
<b>Year</b>	<b>2018/19</b>	<b>2019/20</b>			
<b>Initial Costs</b>		<b>£80k</b>			
<b>External Funding</b>					
<b>Net Cost</b>					
<b>Ongoing Savings(-) /costs</b>					

**Detailed estimates should be provided to finance to assist with budget monitoring and reporting**

**B 7 – Project Scoring Matrix**

<b>Scoring – for your project – calculate the points</b>				
<b>Criteria</b>	<b>1 Point</b>	<b>2 Points</b>	<b>3 Points</b>	<b>Score</b>
Cost £ (budget, time and human resource)	<£10k	£10k - £50K	>£50K	3
Timescale	< 6 months	6 – 12 months	> 12 months	2/3
Impact if project failed on the organisation	Minor disruption	Moderate	Major	2
Melton's Track Record	Done Successfully Many Times Before	Done Successfully Once or Twice Before	New Area of Working	2
Stakeholder Interest (internal and external)	Minimal	Moderate	Major	1
Project Complexity	Straight-forward	Moderately Complex	Highly Complex	2
<b>Total score</b>				<b>12/13</b>

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 Project Board and will allow schemes to be prioritised and feasibility to be assessed. Project board to agree the on-going project management required based on the above scoring and documented on the Project List