

Using intelligence to achieve a First-Class Customer Service

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Portfolio: Transformation and Organisational Development

Ward(s) Affected: All

Purpose of the Report:

The purpose of this report is to set out how the Council proposes to use data and intelligence to drive delivery of the ambitions set out in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses.

Recommendations:

1. Cabinet to recommend to Council the agreement of funding to establish a Business Intelligence Service as set out in section 4.7 of the report.
2. Cabinet to recommend to Council that funding for 2022/23 is drawn from the corporate contingency.
3. Cabinet to recommend to Council that funding for the Business Intelligence Service is built into the base budget from 2023/24.

1. Summary

- 1.1 This report sets out how the Council proposes to use data and intelligence to drive delivery of the ambitions in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses.

2. Background

- 1.2 The Council agreed in March 2020 to move forward with implementing the four-year Strategic Plan which sets out the vision and priorities of the Council.

- 1.3 At the heart of the **Strategic Plan 2020-2024**, is the vision for our place:

‘Working together to create the best place for everyone, now and for future generations’

- 1.4 This vision is underpinned by the Council’s strategic priorities:

- Growing the economy
- Supporting individuals and empowering communities
- Protecting and improving the natural and built environment, whilst maximising quality of life
- Moving with the times, working smartly and collaboratively

- 1.5 The first three of the strategic priorities outlined above are service driven ambitions. The last ambition sets a priority for how we will work in order to deliver the plan. As part of this, our key ambition for the two Councils is to use the best of technology, customer insight and the right resources to deliver value for money services for our customers.

- 1.6 How we said we would achieve this in our **Strategic Plan 2020-2024**:

- Continuously challenging ourselves to ensure we **utilise our resources in the best possible way** and seize opportunities as they arise
- Becoming **an agile, flexible and collaborative organisation**, working across traditional local government/organisational boundaries and driving and adapting quickly to the changing environment
- Continuously improving our customer service offerings to best meet our customers’ needs, **using evidence and data to drive our services**
- Continuing to **use the best technology for the job in hand** and making best use of the opportunities that digital ways of working can bring. Alongside making our digital platforms easy to access
- **Investing in our team and technology** to develop a forward thinking and growth focussed organisation
- Trying out and **testing new approaches and ideas, using the best evidence that we have to inform our decisions** and sharing best practice

- 1.7 To date, we have embarked upon an ambitious transformation agenda, with improving and exceeding our customer expectations at the heart of our work. Over

the last couple of years and in context of Covid, the Council has delivered a range of successful projects aimed at improving customer experience:

- We have launched a new housing system, giving our customers more flexibility to choose their own home
- We delivered a single website and email address for the Councils, providing us with a platform for improving our digital services for customers
- We agreed a new Customer Charter and resources dedicated to customer insight, agreed by Members in July 2021
- We introduced a new customer satisfaction survey, helping us understand and act upon customer feedback to help us continuously improve our services in the future
- We implemented a single telephony system across both councils which allows us to have better understanding of our customer demand on our services
- We have implemented a range of projects to enhance our use of technology across the organisation e.g., Microsoft Office 365, underpinned by our **ICT & Digital Strategy**, agreed by Members in July 2021. This Strategy also sets out **one of the key pillars for success of delivering a first-class customer service being driving digital through greater use of data and intelligence**

1.8 We have the ambition to deliver a first-class customer service, but we know there is more we can do to drive us forward at pace and enable us to deliver this ambition more effectively. The recent work done by the Broadland Members Collaboration Working Group also identified using business intelligence as being critical to improving the services we provide to our customers.

1.9 As set out above, our Strategic Plan was clear that we would utilise evidence, data and the right technology to help us improve our services for customers. As part of the SPARK Transformation Programme and outlined in the Delivery Plan for 2022-24 (see reference MT17 of the Plan), Members have already agreed, as a priority, to deliver a transformational business intelligence programme of work. This is a key area we have identified we can do more, and the remainder of this report sets out the recommendations to Cabinet on how this can be achieved.

3. Current position/findings

Context

1.10 Demand across the whole of the public sector is rising, with residents and businesses under pressure and needing growing support from local government; particularly in the recent context of Covid and the cost of living crisis. This demand is predicted to grow further over the coming years both nationally and locally, with an increase in population and growing older population. For context, Broadland and South Norfolk combined is predicted to see 19%¹ increase in the population by 2043.

¹ ONS

- 1.11 Alongside this, we know that generally, customer expectation is also changing with more of a drive towards 'on demand' type services, providing services in a flexible way to suit different types of customer need and providing good quality services delivered in a timely and efficient way.
- 1.12 With this context, there is a need for us to effectively understand the needs of our customers better, including those who use, or will use, services and the key outcomes that need to be achieved. In order to do this, we must have good access to, understanding of and use of data and intelligence (termed 'Business Intelligence') to both inform our service delivery, and drive transformation of our services in the future. This will also help us to inform our future strategic and delivery plans for the Council in the coming years.

Our use of business intelligence

- 1.13 Intelligence and data is critical to the Council as it will help us to better manage demand, identify savings and make more accurate forecasts for the future both in terms of finance and performance. Business Intelligence can be used for both customer insight, but also operational insight, underpinning service delivery and effective use of resource:

Table 1 – business intelligence benefits

Customer Insight & Intelligence	Operational Insight & Intelligence
Understand the needs, wants and preferences of our customers and target services accordingly (e.g. government grants)	Enables monitoring of business activities (in real time if needed) to ensure we deploy our resources in the most effective way
Ability to make evidence-based decisions on service levels, locations and resources to meet customer demand	Helps to identify what is working, what might be inefficient and help inform continuous improvements in services delivered to our customers
Better support us with targeting our communications through greater awareness and understanding of the customer through the data we hold	Provides clear evidence for both strategic and operational decision making
Aids us to inform service changes based on customer trends (e.g. 'on demand' service)	Allows for openness and transparency of our data internally and externally

- 1.14 Other local authorities have made use of business intelligence in a variety of ways, below is an overview of examples from different Councils have what they have done using intelligence however it should be noted that in each case they will have gone through a process, with the right resource and over a period of time, to get the quality of their data right and held in a central location.

Having open and transparent data

- Cornwall Council has used data and intelligence to enable 'data driven councillors' – by providing access to real time data from Council services, allowing for Councillors to look at service performance, but also understand their local constituent's engagement with services by postcode

Using Data Analytics to predict trends

- London Borough of Barking and Dagenham have been exploring data and predictive analytics as part of their focus on improving preventative action. Through this, the borough is working to use predictive analytics to determine which households are at risk of becoming homeless before it happens

Bringing data sets together to provide new insights

- Suffolk County Council and local health services are using data to help create an integrated service to shift funding towards preventative work and away from costly reactive service and improve the culture and effectiveness of performance management. This has allowed them to diagnose problems in a system more easily such as why there are high numbers of people who have delayed transfers of care from hospitals to residential settings.

Using data to provide better reporting

- North Norfolk Council publish their performance against their strategic measures on their website to inform residents and customers of how effectively they are delivering. They currently do this through a product called InPhase which enables them to provide reports and visualisations both internally and externally. The technology we are proposing to use for the Business Intelligence Service will enable us to produce those types of report and visualisations and much more, but without the restrictions which come with using a third-party provider.

Current state

- 1.15 Across the Council, we hold, manage and maintain significant amounts of data about the services we provide. We have some services, or parts of services that use data to analyse, understand and improve their operational delivery. But we also have areas where we only use data to meet statutory or delivery plan/strategic reporting requirements.
- 1.16 **Framework** - At present, neither Council has a framework for how we plan to use, manage and store our data and intelligence. This means we do not have a consistent approach and are potentially missing out on opportunities to improve our use and analysis of intelligence.
- 1.17 **Storage** – Across the Council, we gather and store data in a range of disparate ways, from utilising existing tools linked to specific service systems, extracting data from systems and placing it into MSExcel Spreadsheets and sometime using paper forms. We know this approach has a range of associated issues such as; risk of data corruption (being copied from one place to another), data integrity and difficulties in retrieving previous data as there is no central storage repository or system.

- 1.18 **Using data and intelligence to inform services** – as we currently have no central data store or reporting system in place, extracting data and intelligence from our systems is time consuming across the organisation and often, hard to access. Each service area where a system is used, has its own methods of extracting data and intelligence, which is often stored in multiple places and in a range of formats. This makes it difficult for us to bring together different data sources from different services to help us identify customer trends and improved customer journeys.
- 1.19 **Using data and intelligence to understand our performance** – understanding and reporting on our performance as a council at present, is largely a manual process. Due to the challenges set out above, understanding our performance, which should be something we are able to do all the time, is often time consuming and difficult and draws on staff resources just to gather data. This is resource that could be better used to analyse the data and provide insight to help improve services for customers. Our longer-term ambition is to enable performance information to be accessed automatically (both internally and potentially externally) and made available at touch of a button.
- 1.20 **Skills and resources** – at present, whilst we have staff across the organisation who are responsible for producing data and some analysis, we do not have dedicated staff with the right skills who can provide deeper levels of insight and analysis.
- 1.21 As prioritised by Members in the Delivery Plan 2022-24, work has been underway, working in partnership with consultants, to explore the opportunities that business intelligence and data could bring to the organisation. This exploratory work has been to date, funded through the Covid budget. This work has included delivering a ‘pilot’ project based on our telephony system and utilising an analysis and visualisation tool from Microsoft called ‘PowerBI’. PowerBI allows the organisation to visualise the data we hold, connect different data sets and bring the data to life. The purpose of the pilot was to explore whether we were able to bring our data into a single storage point, transform and visualise data using an in-house solution and a view to the resources and costs to deliver a service for business intelligence. This pilot has been successful and has given us:
- A greater understanding of customer contact e.g. successful calls, abandonment rates, wait times, average call times, call types. This will allow us to be able to manage our service resource more effectively.
 - The ability to identify trends in our customer contact behaviour e.g. peak call times, by day or by hour. This will allow us to make sure we have the right resource at the right time for our customers.
 - The ability to predict future customer behaviour to anticipate changing demand on services.
 - The ability to focus on the analysis – by providing the data automatically, it has enabled services to focus resource and effort on insight and analysis, to improve services and better manage resource.

- 1.22 Alongside the above pilot on telephony, we also conducted some initial work looking at housing and homelessness data. Even at an early stage, this provided insights which we would not have identified in a normal course of events (e.g., it allowed us to visualise those on the housing list by geographic location and their most recent application date).
- 1.23 The pilot as set out above provided the assurance, knowledge and evidence that the proposed model for business intelligence is the right approach for the Council moving forward.

Strategic drivers for change

- 1.24 **Service delivery for customers** – as demand for services is changing, it is even more important for us to understand this demand in more detail and make sure we are able to ask the right questions to improve our service offering. It is key we are able to not only use data and intelligence to understand ‘what has happened’ but also to understand ‘why is it happening, what could we do differently, what happens if we change xyz’ and predict what might happen in the future.
- 1.25 **Wider context** – local government has faced a sustained reduction in the funding from Central Government over the last few years, with district councils having taken the hardest financial hit², with districts seeing a 35% reduction in the overall real terms spending power between 2010-11 and 2020-21. Broadland and South Norfolk Councils, like many local Authorities, continue to operate in a climate of financial uncertainty with increasing demands on services alongside unpredictable future changes to government funding, from the potential changes to the Business Rates Retention Scheme and the Fair Funding Review, as well as a lack of clarity around the New Homes Bonus funding. This context provides the Council with the need to continuously review our service delivery models to ensure they remain efficient, effective and relevant to our customers. Key to this will be the data, intelligence and insight we use to inform the decisions we make in the future.
- 1.26 **Open and Transparent Services** – both Central Government and the LGA are promoting the increasing need for local government to release open data, enabling data and insight to be used more meaningfully to engage with the public and other public services. Recently, the Levelling Up White Paper also announced Governments move towards establishing a new independent body in England focussed on data, as well as a new Spatial Data Unit, aiming to empower citizens with information about their local area and drive data transformation.

4. Proposed action

- 1.27 In order for us to take advantage of the benefits that intelligence and data could give to use to improve our customer offering, it is critical that we invest in the right resources and technology. To enable us to do this, it is recommended that we invest in establishing a new Business Intelligence Service, alongside the proposed technology required. The proposal for this is outlined below.

² [Analysis by the Institute for Fiscal Studies](#)

Business Intelligence Service

1.28 We are proposing to establish a new Business Intelligence Service across the organisation. As set out above, this is something we do not currently have within our existing resources. A business intelligence service will enable the organisation to deploy, manage and use business intelligence tools and technology to improve customer services.

1.29 Below is an overview of what the new service would be doing:

- Provide a secure repository of 'clean' data which becomes a trusted and consistent reference point for reporting, trend analysis, planning, decision making and cost/benefit analysis.
- Automate reporting to reduce time spent on resource intensive, manual data gathering will release capacity to focus on high value performance and data analysis.
- Produce, up to date, dashboards which provide key performance data, at the touch of a button, right across the organisation. This can be both internally (team leader through to senior leaders) and eventually externally (members and residents)
- Provide a tool for innovative analysis of service data and releases existing resource time to carry new insights which identify areas for improvement, savings, revenue generation and inform decision making.
- Facilitate cross organisational data analysis and open opportunities for wider data sharing with other organisations in a secure and controlled way.
- Provides a basis for many intelligent technologies which we may want to consider that will support service transformation.
- Supports compliance with data retention legislation and provides an auditable repository for data. Provides consistency of data and data governance protection
- Embeds specialist skills within the One Team and standardises reporting functionality which will enable us to build a cohort of Power BI expertise removing the risk of a single point of failure.
- Delivers a flexible, scalable 'in house' solution over which we have the control to amend, change, develop without incurring further costs
- Currently services spend considerable time running both regular and ad-hoc reports to meet reporting requirements and requests for information. We anticipate that moving to this approach will release capacity that can be redeployed onto analysis that we help us understand how best to deliver services to customers in the most effective and efficient way and to drive continuous service improvement.

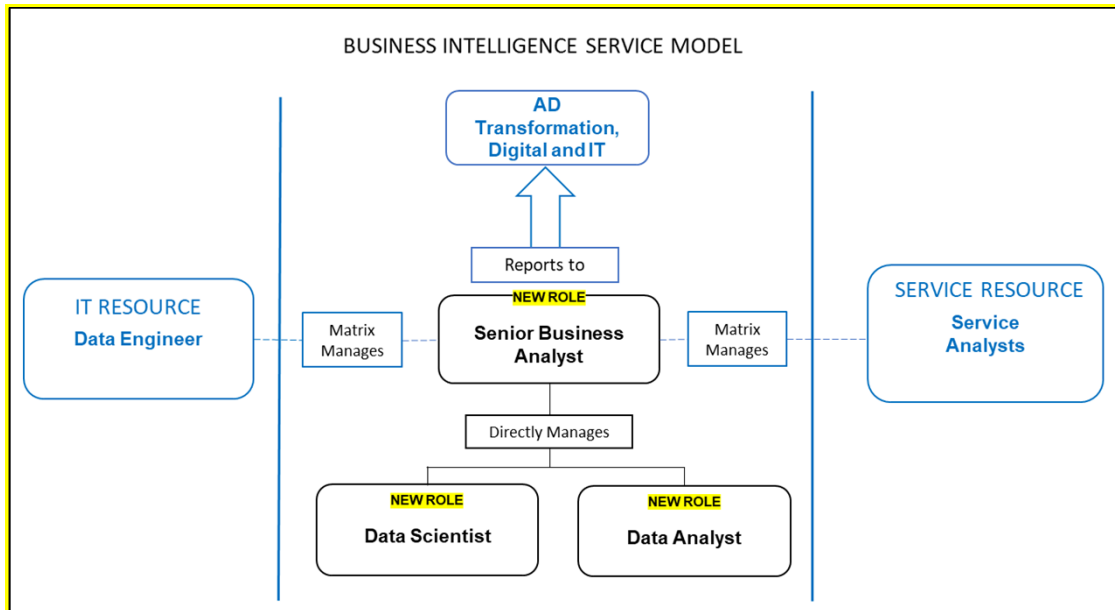
Technology to enable the service

1.30 The 'pilot' established that the best approach for us is to develop our business intelligence model 'in-house' using tried and tested tools from the **Microsoft suite** of services (Microsoft Azure and Microsoft PowerBI). This enables us to build our central data storage at a pace which is suited for the organisation. Whilst these tools are already available and used by the Council, to deliver the proposed

business intelligence model, we need to increase the capacity and usage of the tools, which will require investment for the Council (see table x below).

Resources to enable the service

4.5 We anticipate that the Business Intelligence Service will need specialist resource to ensure that the service is correctly managed, governed and has sufficient resource to deliver and maintain a range of services across the organisation. The table below shows the key roles, where they will sit in the structure and includes a brief overview of the responsibilities and connections with existing roles.



Senior Business Analyst – Responsible for governance of the Business Intelligence Service. Responsible for interpreting data to provide insight and analysis to the organisation. Line management and matrix management responsibilities for the team

Data Scientist – Responsible for modelling and transforming data to create an information resource for the Data Analysts

Data Analyst – Responsible for interpreting data to provide insight and analysis to the organisation

Costs of service

1.31 The costs of operating a Business Intelligence Service which can support and serve the needs and requirements of the whole organisation are set out in table below in paragraph 4.7

1.32 This breaks down between the costs for technical products and cost for the resources and consultancy.

1.33 We know that Data Analysts and Data Scientists are highly sought after and can be difficult to recruit in the marketplace. The resources budget we are asking for gives us the flexibility to tailor our approach to as required. This could be through substantive recruitment, by growing our own skills through graduate apprenticeships, buying in specialist consultancy as needed or a mixture of all of these approaches.

Business Intelligence Service <small>(costs are based on 22/23 prices)</small>	Budget Required (£)				
	2022/23	2023/24	2024/25	2025/26	2026/27
Technical Costs	0	12,868	15,146	19,861	19,861
Resource & Consultancy Costs <small>(on-costs included where relevant)</small>	45,281	121,241	171,910	166,910	166,910
Totals (combined)	45,281	134,109	187,056	186,771	186,771
(45/55 applied)					
BDC	20,376	60,349	84,175	84,047	84,047
SNC	24,905	73,760	102,881	102,724	102,724

Next steps

1.34 Following agreement to fund a new business intelligence service for the organisation, there are some key activities which will take place as set out below:

- Recruit to the roles required and enable the technology in the most cost-effective way, to deliver the service as outlined in section 4.5
- Begin a phased roll out of the business intelligence model across the organisation – this will be done by bringing operational data into a central data store on a service-by-service basis
- Work with services to start using their data and intelligence to drive improvements to services for customers
- Design and develop a new open and transparent approach to providing our strategic performance data on our website

5. Other options

1.35 There is an option to continue as we are currently and not investing in a new intelligence service and operating model. However, this would come at the risk of not being able to fully achieve our ambitions of driving a first-class customer service. We would continue to have a less effective and efficient way of utilising intelligence for the customer and service improvement. The desire from service areas for data insight and analysis will continue to grow nevertheless and if we cannot provide this as a service within the One Team then we will need to buy in services. Recently one of our services areas purchased a 12month contract for a specialist data analysis and insight service at a cost of £40K per annum.

6. Issues and risks

- 1.36 **Resource Implications** – The proposals listed in section 4 above outline the costed model for delivering a Business Intelligence Service to achieve a first-class customer service offering. These proposals include the funding required to deliver this model and will be an increase to the existing budget for the Council.
- 1.37 **Legal Implications** – None applicable to this report.
- 1.38 **Equality Implications** – None applicable to this report.
- 1.39 **Environmental Impact** – None applicable to this report.
- 1.40 **Crime and Disorder** – None applicable to this report.
- 1.41 **Risks** – None applicable to this report.

7. Conclusion

1.42 In summary, this report has set out how the Council proposes to use data and intelligence to drive delivery of our ambitions in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses. As demand changes, expectations grow and the context we are working in evolves, it is ever more important that we are able to efficiency and effectively access, manage, maintain and use our data and intelligence as an asset, to improve our customer offering.

1.43

8. Recommendations

1. Cabinet to recommend to Council the agreement of funding to establish a Business Intelligence Service as set out in section 4.7 of the report.
2. Cabinet to recommend to Council that funding for 2022/23 is drawn from the corporate contingency.
3. Cabinet to recommend to Council that funding for the Business Intelligence Service is built into the base budget from 2023/24.

Background papers

Strategic Plan 2020-2024

Delivery Plan 2022 – 2024

ICT & Digital Strategy