

CUSTOMER EXPERIENCE PROGRAMME – UPDATE

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Portfolio: Transformation & Organisational Development

Wards Affected: All

Purpose of the Report:

This report provides an update on the progress of the Customer Experience Programme and seeks to gain approval for the recommendations outlined in this report. The report seeks the views of Overview and Scrutiny on the proposed member engagement and the draft key reporting milestones.

Recommendations:

1. Consider and make recommendations to Officers on the key principle related to member engagement in the delivery of the Customer Experience Platform.
2. Recommend that Overview and Scrutiny add key milestone one, outlined on page four of this report, to the work programme to allow for input on the proposed draft of the Customer Journey Mapping roadmap.
3. Acknowledge that any update post procurement and contract award is received informally via email.

1. Summary

- 1.1. Broadland District Council committed in the Council Plan to *“make it easy for our residents and businesses to access our services and receive the help and support they need.”* In December 2023, it was agreed to initiate a Customer Experience Programme as a mechanism to achieve this aspiration.
- 1.2. The Customer Experience programme’s strategic aims are outlined below:
 - 1.2.1. **Customer First;** Customer-centred channels of choice available 24/7, learning from customer feedback and insight to design and target services to those that most need them
 - 1.2.2. **Every contact counts;** Maximising the value of every contact by joining up our services, systems and data to provide a seamless customer journey
 - 1.2.3. **Right first time;** meeting customer needs, first time, every time. Minimising costs and repeated contact, keeping the customer informed at every stage
 - 1.2.4. **Technology Enabled;** transforming service delivery, streamlining services and removing obstacles using data, technology and insight.

2. Background

- 2.1. In December 2023, Broadland District Council agreed to initiate a Customer Experience Programme as a mechanism to achieve the strategic aims set out in the Council Plan.
- 2.2. The programme consists of the procurement of a new Customer Experience Platform and enabling technologies such as, integrations. The outline business case estimated a total investment of £1.7 million with Broadland District Council’s investment totalling £787,950. This investment has been built into future revenue and capital budgets from 24/25 onwards.
- 2.3. The programme is expected to deliver a minimum of £3.5 million savings by year 8 with Broadland District Council’s share of savings at £1.6million. An ROI by Year 5 has been estimated.
- 2.4. The outline business case provided savings based on a reduction in FTE of 10% (14FTE) by year three and increasing to 13.5% by year five. It’s predicted that these savings will be made through the reduction in manual processing and repeatable demand. These savings did not include any reduction in technology costs.
- 2.5. The business case financials have been based on assumed market costs at the time and assumed demand. As we progress through the stages of procurement

the cost of the technology and the reduction in FTE will be further refined and reported.

3. Current positions/findings

3.1. The outline business case set out a high-level programme plan against the deliverables anticipated. The table below provides an update on progress against this timetable. Overall, the programme is currently on track against time and budget and is already set to release a total £15,512.00 of savings in-year as the result of a successful website procurement exercise.

| Year 1 | Progress | Savings released to date |
|---|---|--|
| <p>Timescale: End of Quarter 4</p> <p>Website</p> <p>Procure and implement a new Enterprise Content Management System</p> | <ul style="list-style-type: none"> • Procurement completed and contract awarded to new supplier • This includes new base forms platform • Go-live Autumn 2024 | <p>BDC (45%): £6,980.00</p> <p>Total savings: £15,512/annum</p> |
| <p>Customer Experience Platform</p> <p>Carry out early market engagement, tendering and procurement for the Customer Experience Platform</p> | <ul style="list-style-type: none"> • Early Market engagement documents created • Contract award expected by Autumn 2024 | <p>N/A</p> |
| <p>Customer Journey Creation</p> <p>Begin customer journey mapping to identify new end user journeys</p> | <ul style="list-style-type: none"> • High demand service areas have been identified • Council Tax, Housing and Waste have been identified as the three initial targets areas a roadmap is now being developed • Customer Journey Mapping will start Spring/Summer 2024 | <p>N/A</p> |

| | | |
|---|---|------------|
| <p>Migration of forms</p> <p>Review and develop roadmap for the migration of forms over to the new platform.</p> | <ul style="list-style-type: none"> • Review of current forms and migration plan is being developed • Some forms may be migrated over to the new platform 2024 | <p>N/A</p> |
|---|---|------------|

4. Programme Governance

- 4.1. The programme forms a core aspect of our innovation agenda and is governed by the Project and Programme Framework and includes reporting of deliverables at a number of internal boards tracking budget, time, resource, risks and issues escalating and de-escalating accordingly.
- 4.2. Ongoing progress of the Customer Experience Programme will be reported quarterly through the Strategic Performance Reports.
- 4.3. In addition to the governance set out in the Project and Programme Framework it is proposed that the programme reports to Overview and Scrutiny on a regular basis to support in shaping the future direction and scrutinise progress on the programme as it progresses. The following reporting milestones are outlined for Overview and Scrutiny’s consideration:
- 4.3.1. Milestone One: Roadmap for Customer Journey Mapping, expected in Quarter Two 2024. This would seek views on the order and timeline on the services mapped with an evidenced approach against benefits realisation.
- 4.3.2. An informal update at milestone two; the result of the procurement process with confirmed costs expected in Quarter Three Autumn 2024.
- 4.3.3. On programme closure expected Quarter Four 2026/27
- 4.4. To date, it is only possible to propose the reporting milestones that are known as outlined above. Post contract award and mobilisation we plan to propose additional reporting milestones for Overview and Scrutiny’s consideration.

5. Member Engagement

- 5.1. As the programme progresses, we will consider the opportunities to involve members in the development of the final product. We propose that member engagement is sought in the development of several individual digital end-to-end processes through a member user group. This will involve testing user journeys against specifications and providing feedback in an iterative manner.

6. Issues and risks

6.1. **Resource Implications** – resource will be covered.

6.2. **Legal Implications** – currently no legal implications.

6.3. **Equality Implications** – currently no equality implications.

6.4. **Environmental Impact** – currently no environmental implications.

6.5. **Crime and Disorder** – currently no crime and disorder implications.

6.6. Risks –

6.6.1. Projects and programmes are subject to careful planning and timescales, budget and resource is carefully considered throughout delivery. It must be noted that there is a possibility that the milestones outlined could change once a supplier is appointed and detailed mobilisation is completed. This will be communicated accordingly.

6.6.2. The programme spans a 3-year period, with benefits tracked beyond the first five years there is always a risk that key project and programme resource may not be fully retained throughout the full programme lifecycle.

7. Conclusion

7.1. This programme is in its early stages, as programme planning progresses and we appoint a partner or a supplier the opportunities for further reporting milestones will be refined and proposed accordingly.

7.2. It is likely that the programme will also report on programme closure. However, it's important to note that this will not be the same milestone as the point in which the benefits are realised.

7.3. The programme reporting milestones will be proposed in an agile manner and therefore, this report is reflective of the known milestones only. It does not reflect all of the proposed reporting milestones across the lifecycle of the full programme.

8. Recommendations

1. Consider and make recommendations to Officers on the key principle related to member engagement in the delivery of the Customer Experience Platform.

2. Recommend that Overview and Scrutiny add key milestone one, outlined on page three of this report, to their work programme to allow for input on the proposed draft of the Customer Journey Mapping roadmap.

3. Acknowledge that any update post procurement and contract award is received informally via email

Background papers

Customer Experience – Business Case