Governance and Resources Committee
14th January 2021

Report of Director of Corporate and Customer Services

DIGITAL TRANSFORMATION PROJECT UPDATE AND CRM FUNDING REQUEST

PURPOSE OF REPORT

This report provides Members with an update on the District Council's Digital Transformation project, the impact of the COVID-19 crisis on the project and the rationale for requesting additional funds to support the COVID-19 response.

RECOMMENDATION

1. That the report be noted.

2. That approval be given to a supplementary revenue estimate for 2020/21 in the sum of £12,000, to be financed from the Additional Burdens Grant awarded to the Council from central Government to continue to enable the Council to provide an effective COVID-19 response and to support the District's businesses.

WARDS AFFECTED

All

STRATEGIC LINK

Enabling the customer to enquire of, and transact with the District Council, in the most efficient manner, is at the heart of the District Council's objectives. The funding will enable the District Council to provide effective and efficient COVID relief to the District's Businesses.

1   BACKGROUND

1.1   At the meeting of the Governance and Resources Committee held in November 2018, Members considered the work of the Customer Innovation Hub which was established with the following aims and objectives:-

Aims

To scope, procure and implement, a customer platform that integrates with existing systems to enable us to drive channel shift and to deliver easier, faster and better customer service.

Objectives

- Provide our customers with an improved, user friendly and accessible means of accessing and paying for services electronically;
- Promote a culture of 'digital by choice' for all customer interactions and move the

organisation to a future state where customer service and satisfaction is key to our success;

- Minimise avoidable contact by unifying communications across the organisation;
- Transform customer interactions to the leanest form;
- Identify cashable efficiencies by the transformation of service delivery;
- Provide a means of implementing income generation opportunities;
- Develop by June 2019, a Customer Access Strategy as a means of setting standards and guidelines for delivering convenience and excellence for our customer which we can measure our performance by;
- Map current service provision on key priority areas and estimate level of time and effort required to deliver 'as is service'. Key priority areas currently defined are:
  - Ordering, paying for and providing:
    - new / replacement bins;
    - regular chargeable bin collections;
    - occasional bulky waste collections;
    - regular or occasional trade waste collections;
    - ordering, paying for and providing car park permits and replacement resident passes;
    - paying non domestic rates and council tax bills;
- Devise simple means of gauging customer interest in modernising service provision and likely resistance to change.

1.2 The contract for the provision of a CRM system was signed with the preferred supplier; Meritec Ltd, at the end of March 2019 for an initial period of two years. The contract includes professional services to configure the system to replicate the councils existing e-Forms, the development of a new website home page built to encourage customer use of the CRM system and the integration of the system with the council's network infrastructure and core systems.

1.3 In March 2020 the COVID-19 crisis resulted in a nationwide lockdown, requiring the Town Hall to be closed to the public and the majority of District Council staff to work from home where possible. The lockdown had a dramatic impact on resident and customer access to the District Council and the District Council's ability to effectively respond to service requests.

1.4 In July and August 2020 the first COVID-19 business grant (the Discretionary Grant Fund) was established as the lockdown restriction was scaled back. Further support payments and business grants were launched throughout the rest of 2020 including; Test and Trace Support Payments, Local Restrictions Grant Schemes and the Additional Restrictions Grant scheme.

2 REPORT

2.1 The CRM system launched on 1 April 2020 with 49 forms; replacing all existing District Council web forms whilst, introducing a number of new, automated and customer trackable services. The CRM launch also including the launch of the MyAccount functionality which allowed users to track the progress of Clean and Green service requests and a customised dashboard with data on their waste collections and Councilors.

2.2 In addition to the CRM launching on 1 April, the Digital Transformation Project launched three new fully CRM integrated payment systems; SCP for self-service card

and PayPal payments, Paye.net Portal for payments made via the phone or in person at reception and Paye.net which replaced the District Council's old Cash receipting system.

2.3   During July and August the CRM system was utilised to provide a fully digital end to end solution for businesses to apply for the COVID-19 Discretionary Grant Fund. The CRM system processed over 340 applications and the payments of approved grants. The CRM system also facilitated the requirements for reporting back to Central Government the progress and impact of these grants

2.4   July also saw the launch of the COVID-19 business intentions registration form launch within the CRM. This form was designed to support the District Council to track and support business to re-open following the lockdown.

2.5   The Digital Transformation team managed the implementation of the new Whitespace waste management system went live as planned on 3 August 2020; with in-cab technology and 11 new integrated CRM forms, providing real time data to the customer in relation to both the progress of their collections as well as updates on enquiries and service requests they raised. This work utilised the Lean process designs originally scoped as part of the Value Stream Analysis work conducted in the autumn of 2019. As a result a number of processes are now fully automated, such as Serco automatically re-ordering damaged or lost containers when they are responsible. Enhancements to the CRM forms now provide customers with a range of information such as if Serco have damaged or lost a container the CRM can inform the resident of this fact and that a replacement has been ordered. The system will also provide customers reporting a missed collection any status updates that may cause delays in their usual collection, such a vehicle breakdowns etc. and details of any reasons why waste was not collected, such as recycling bins being contaminated.

2.6   In September the new Garden Waste Subscription Service was launched within the CRM. This solution allowed customers to apply for the new subscription service and fully automatically processed all successful subscriptions in to the new Whitespace system. At the time of writing this report there have been over 10,000 subscriptions taken out via the CRM system. Together with its integration payment systems the solution has collected over £354,000 of subscription fees.

2.7   A further two COVID-19 support forms were launched via the CRM in October. The first to allow business to quickly and automatically apply for pavement licenses to assist business to begin or expand outdoor business opportunities. The second; the Test and Trace Support Scheme, designed for individuals who lost income as a result of the isolation requirements. This scheme was fully managed end to end within the CRM system and has handled over 250 applications to date.

2.8   A new fully integrated and paperless Direct Debit system was implemented in mid-November to support the Garden Waste Subscription Service and at the time of writing this report accounts for 7% (£24,395) of income to the subscription service in year 1 with a further £7,700 of income currently being processed.

2.9   Further COVID-19 related business grant schemes were launched in November to support business initially in the first tiered systems, and then the second national lockdown. Again the CRM was utilised to provide a fully automated and end to end

solution to handle, process and pay the grants whilst allowing customers to track their progress. As at the last official update (close of play on 23 December 2020) the CRM had supported the payment of 895 Lockdown local Restrictions Support Grants (Closed) totaling £1,316,498 with a further 113 approved for payment in January. In total over 1,440 applications have been received at the time of writing.

2.10 Two further business grants were launched in via the CRM system in December 2020; Additional Restrictions Grants and the Wet-led pub Christmas Support Payments. At the time of writing over 220 applications have been submitted across these two schemes with the first payments having been made to successful applicants on 5 January 2021.

2.11 The CRM has been instrumental in supporting the residents and business of the District during 2020 and allowed the District Council to continue to maintain its services throughout the COVID-19 crisis. The CRM's integrated, automated and efficient technology and process design allowed for a range of services to continue throughout the period and allowed the District Council to continue to deliver services with reduced functional staffing levels during the initial lockdown and beyond. As a result since the 1 April 2020 to 31 December 2020, the CRM has increased the number of services available online from 49 at launch to over 80. It has processed over 46,000 enquiries with 91% submitted directly by the customer via Self Service and has 3,599 registered MyAccount users at the time of writing.

Month	BSU	Self Service	Total	% via SS
Apr-20	99	1367	1466	93%
May-20	131	1635	1766	93%
Jun-20	199	1975	2174	91%
Jul-20	230	1900	2130	89%
Aug-20	232	7137	7369	97%
Sep-20	921	10512	11433	92%
Oct-20	1007	5855	6862	85%
Nov-20	623	5172	5795	89%
Dec-20	522	7025	7547	93%
Total	3964	42578	46542	91%

2.12 In the same period the CRM and the integrated payment systems have taken payments of more than £2,000,000.

2.13 The scale of the technical support required to implement and automate payment of the latest round of COVID-19 business support grants; coupled with the increasing number and complexity of schemes; the extreme deadlines and additional priority activities for the Digital Transformation team has required and will continue to require us to procure additional technical consultancy services from the CRM providers (Meritec).

2.14 Meritec offer customers the ability to purchase consultancy days in packages of 10 days at the rate of £650 (+VAT) per day. To date the authority has utilised approximately nine days of consultancy work from Meritec to support the District Councils objectives. Additionally, officers have identified a number of additional

technical requirements we will need of them to support the existing COVID-19 grant schemes.

2.15 As a result of the work already undertaken by Meritec and in anticipation of the additional services required to support the District Councils COVID-19 response it is recommended that the Council procures two 10 day consultancy packages at a reduced rate of £600 (+VAT) per day; totaling £12,000 (+VAT).

2.16 These technical consultancy days will cover the additional work conducted by Meritec to date, the anticipated work for the current COVID-19 business support schemes and provide the District Council with resilience for additional consultancy work in support of the CRM system and the District Councils ongoing priorities and COVID-19 response.

2.17 As these costs relate directly to and are as a result of increased burdens resulting from the COVID-19 crisis it is recommended that it is approved to allocate this cost to the Additional Burdens grants received from Central Government.

2.18 The Council's decision to invest in a CRM system has been proven to have paid off significantly in the face of the challenges presented in responding to the Covid-19 pandemic. The self-service functionality it provides, as well as easy to use pathways through the Council's website to apply for Covid grant funding has meant that the Council has been better able to serve its customers and do so more efficiently. Further work will be required in respect of Phase 2 of the CRM implementation which will deliver further efficiencies and improvements, however the timing of this work is likely to impacted by the demands of responding to Covid-19, which has delayed various aspects of the digital transformation to date. Members will continue to receive update reports in respect of the progress made in implementing the CRM and demonstrating where improvements have been made and efficiencies realised.

3   RISK ASSESSMENT

Legal

3.1   There are no direct legal implications arising from this report and the legal risk is therefore considered to be low.

Finance

3.2   The additional spending of £12,000 can be met from the Additional Burdens Grant received from the government so the financial risk is low. However, as there is no approved budget for this expenditure, the item will need to be referred to Council for approval of a supplementary revenue estimate for 2020/21, to be financed by grant.

4   OTHER CONSIDERATIONS

4.1   In preparing this report, the relevance of the following factors has also been considered: prevention of crime and disorder, equalities, environmental, climate change, health, human rights, personnel and property.

5   CONTACT INFORMATION

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6 BACKGROUND PAPERS

6.1 21st November 2019 – Report to Council – Capital Funding Request – Customer Relationship Management

6.2 5th September 2019 – Report to Governance and Resources Committee

6.3 25th February 2019 – Report to Governance and Resources Committee

6.4 22nd November 2018 – Report to Governance and Resources Committee

6.5 2018/2019 – Customer survey findings