



**COUNCILLOR  
MATTHEW PATRICK**

**CABINET MEMBER FOR  
COMMUNITY ENGAGEMENT  
AND COMMUNICATIONS**

**CABINET**  
**27<sup>TH</sup> MARCH 2017**

**ACCESS WIRRAL:**  
**TRANSFORMING CUSTOMER SERVICES**

**Councillor Matthew Patrick, Cabinet Member - Community Engagement and Communications, said:**

“Contacting the Council needs to be as easy as possible – Access Wirral will do just that.

Access Wirral will deliver a quick, seamless and efficient route for residents to contact the Council. By removing the duplication of systems, it will help staff provide much needed support in the most efficient way.

By investing £1.2million in a state-of-the-art system, we will improve our customer services enabling people to be self-sufficient by accessing services quickly, digitally and easily.

With improvements, we could drastically reduce the waiting time for low-risk claims for Housing Benefit. This would see those claims paid sooner, protecting vulnerable residents from turning to expensive pay-day lenders.

This investment allows us to make savings in the near future; once the system is embedded and working to specification, it will enable us to direct our skilled staff resources to ensure the most vulnerable residents receive appropriate support to successfully and confidently access the services they need.

Access Wirral is a major step forward in how the Council supports residents.”

## REPORT SUMMARY

Access Wirral is the Council's approach to reshaping and improving customer service, making it easier, faster and more efficient to do business with the Council. The Wirral Plan 2020 recognises the need for the council to be a modern public service. It notes that: "Technology continues to move at breathtaking speed ... we must be – and will be – a Council which is fit for the digital world. Our services must be accessible, delivered sometimes entirely online to reduce costs and to improve speed and efficiency."

This report and the attached Full Business Case takes us a step forward with that intention, by automating Council Tax and Housing Benefits as much as possible, while ensuring that those who need more focussed support are able to get it. We know not everyone has the ability or means to use digital services, and many of our more vulnerable residents will continue to need expert advice and support. We believe that we can considerably shorten the process for low risk benefits claimants so that they are able to get their housing benefit much more quickly.

Through the Access Wirral transformation project, extensive work has been undertaken during the past nine months to develop a detailed Full Business Case aimed at delivering major improvements in the council's ability to provide excellent customer services.

The Full Business Case includes an analysis of strategic fit, the economic options appraisal, and the commercial viability of the proposal together with the financial case and an assessment of our requirements to enable delivery.

The recommended option for approval through this report is Option B – Redesign of in-house provision, with investment to procure a state-of-the-art Customer Access System to support the effective digitalisation of services over the period of the programme at a cost of £1.2 million.

Successful implementation of the Customer Access System would enable the organisation to deliver major savings in future year. In the first instance, transforming the way in which we deal with Council Tax and Housing Benefit would provide a return of £3 million by 2020, and we could then look to use the system to gain greater benefits once proof of concept has been demonstrated.

This provides the further opportunity to target resources onto providing more intensive support to those vulnerable residents who may feel 'digitally excluded' from newer technologies.

An extensive programme of user testing, staff engagement and customer outreach will take place over the course of the implementation of Access Wirral to ensure it is delivered in a fashion which responds to resident needs.

Access Wirral is part of the overall customer experience programme under the transformation programme.

## **RECOMMENDATIONS**

Cabinet is requested to:

1. Note the contents of the Business Case provided, including options appraisal, staff implications, consultation proposals and risk implications – and support the recommendation that Option B is the preferred option.
2. Delegate authority to the Director of Transformation to take the appropriate actions to deliver the agreed option.
3. Agree that the Business Scrutiny Committee be provided with regular updates on progress.

## SUPPORTING INFORMATION

### 1.0 REASON/S FOR RECOMMENDATION/S

The council is working to improve its customer service performance, as committed to in the Pledge 'Community Services are joined up and accessible'. A new approach is required in order to enable our customer services staff to be able to provide a modern, joined up and efficient service to residents.

A project was developed through the Transformation Programme, in order to fully explore the options available and produce a detailed Business Case to determine the most appropriate new approach. The proposed option involves reshaping the services in-house, making sure they are operating at the optimum level, before seeking to further develop the approach at a future date.

The recommended option (Option B) allows for huge changes to be made in how queries and contacts are handled. At the moment, a call centre handler will potentially use many different systems in any given day – leading to longer call times, complicated handovers between systems and a poorer service for residents. Implementing a new Customer Access System reduces this to one system which allows residents and staff to navigate systems and request services much more easily.

This option also allows the organisation to invest in delivering major improvements in the quality, speed and effectiveness of a range of customer contact services, and further allows the council to deliver future revenue savings through redesigning back-office systems and administrative processes.

Options which were discounted at this stage, for a variety of reasons explored more fully within this report and the attached Business Case, include: do nothing, an outsourced service model, and the creation of a Joint Venture or similar organisation.

### 2.0 OTHER OPTIONS CONSIDERED

The Access Wirral programme identified and assessed four options. The assessment includes understanding the costs, benefits, risk advantages, disadvantages and critical success factors. In summary the 3 options discounted are:

- **Option A** – This option would see the current operating model including the retention of existing One Stop Shop and Contact Centre service levels. For our customers, this would mean that current provision remained broadly unchanged, with the exception of improvements to the Council's IT provision delivered under the Digital Services project.
- **Option C** - This option would involve identification of a package of services and the procurement of a joint venture partner (JV) to deliver these.
- **Option D** - This option would involve the definition of a specification to take to the market to seek commercial providers for all or some of the current services – either together or as separate packages.

More detail about the options can be found in the Full Business Case which forms an appendix to this report.

### **3.0 BACKGROUND INFORMATION**

In developing the business case a significant amount of customer insight, system review and identification of national good practice has taken place. We know that budgets are reducing, customer's expectations are rising, and we need to deliver our services differently to ensure that they are supported effectively and efficiently. When the Call Centre and One Stop Shop contacts were reviewed, they illustrated that for the Call Centre 23% of contacts were for Council Tax, and 20% were for Housing Benefit. For the One Stop Shops this increased to 37% of contacts in relation to Housing Benefit, and 14% for Council Tax. In both routes of contact these were the top two reasons for contacting the Council. The contact channels show that the Call Centre receives 81,979 calls per year, and 89,839 items of post are dealt with. On average, for every housing benefit request customers have to contact us four times; there are two contacts for every council tax request.

The Access Wirral programme will support customers to easily self-serve by providing good access to online services in a manner they will find convenient, simple to use and effective. By successful moving the majority of demand to online channels we can meet our customers' expectations and reduce our costs.

However, it is recognised some customers are digitally excluded and would not be able to benefit from channel shift. There will be sufficient staff retained to provide a robust service. Alternative support through the use of the IT facilities in the Council's Libraries and One Stop Shops or through partner organisations will be directed towards supporting them.

Customers with a particularly complex query will be offered a call back from staff within the Call Centre.

The options outlined were presented to an extraordinary workshop of the Business Scrutiny Committee on the 14<sup>th</sup> February. Two of the main areas of discussion were the need to make sure that the 'front end' of any new system is easy to use for the customer, and the need to continue to support those who are vulnerable. The Scrutiny workshop report is attached as an appendix to this report.

### **4.0 FINANCIAL IMPLICATIONS**

The preferred option involves using a mixture of internal and external resources to fully redesign the current service model to develop innovative and cost-effective ways of working, ensuring maximum value for money from in-house provision.

This option requires initial investment and commitment to deliver the necessary changes to services. There is a need for a one-off investment during 2017/18. Savings will occur during 2018/19 and will be £3m per annum.

### **5.0 LEGAL IMPLICATIONS**

Procurement rules will be followed in securing the proposed software and any external support.

## **6.0 RESOURCE IMPLICATIONS: STAFFING, ICT AND ASSETS**

### Staffing Implications

As the new Customer Access System is embedded across services, there will be an opportunity and requirement to redesign – and reduce – the staffing structures, administrative processes and systems which currently underpin the services. This will be required in order to ensure the services which residents receive are as streamlined and seamless as possible.

This will lead to a phased reduction of posts. This reduction will be delivered through extensive and transparent engagement with staff and Trade Union colleagues and, as much as possible, through the natural reduction of staff numbers (where people leave the organisation or retire), and through voluntary means. While there may be a need for some compulsory redundancies we will seek to keep them to an absolute minimum.

Importantly, we will ensure no major changes to the underpinning service structures are implemented until the new system is in, working, tested and delivering the right results and service for residents.

### ICT Implications

The ethos behind the Customer Access System (CAS) is that it will become the de-facto “front end” solution for all staff within the Transaction Centre. This approach will facilitate a single view of the customer within the CAS. This approach will help reduce average call time as advisors do not have to review multiple systems to resolve a query. For example, a Call Centre advisor uses up to 19 systems a day to help resolve customer queries.

As part of the wider roll out of CAS across the Transaction Centre, legacy systems will be reviewed and where possible legacy system data will be imported into the CAS to allow older legacy systems to be decommissioned.

## **7.0 RELEVANT RISKS**

A full and detailed risk register for this project is in place and is managed through the overall governance of the programme and the wider Transformation Programme.

## **8.0 ENGAGEMENT/CONSULTATION**

A core team of staff have been involved in the development of the proposals. With a robust communications plan and change management strategy in place, both customers and staff will be engaged throughout each phase of the project. There will be regular meetings with staff throughout the length of the project as part of the change management process.

Subject to Cabinet approval of this report, the project would start on the 3<sup>rd</sup> April 2017. A period of testing which would provide the Council with 6 months of data from the automation of Council Tax and 3 months of data from the automation of Housing Benefit will enable a future restructure to be achieved only once the new

system was shown to be working. Any reduction in staffing is likely to take place from September 2018 onwards.

A meeting has taken place with Trade Unions to brief them on the proposals, and a commitment to continue to work with them as the proposal is implemented has been agreed.

## 9.0 EQUALITY IMPLICATIONS

An Equality Impact Assessment has been produced and is attached as an appendix to this paper. Issues identified in the EIA will be addressed through the implementation phase of the project.

**REPORT AUTHOR:** *Fiona Johnstone*  
*Director of Health & Wellbeing (DPH) and Project Owner*  
Telephone: (0151) 651 0011  
Email: [fionajohnstone@wirral.gov.uk](mailto:fionajohnstone@wirral.gov.uk)

## APPENDICES

Appendix A - Access Wirral Full Business Case

Appendix B - Business Overview and Scrutiny Committee  
Report 14<sup>th</sup> February 2017

Appendix C - Business Overview and Scrutiny Committee  
Presentation 14 February 2017

Appendix D - Access Wirral Equality Impact Assessment

## REFERENCE MATERIAL

NA

## SUBJECT HISTORY (last 3 years)

Council Meeting	Date
Business Overview and Scrutiny Committee Workshop	14 <sup>th</sup> February 2017
Business Overview and Scrutiny Committee	13 <sup>th</sup> September 2016