

## RESIDENT SERVICES PROGRAMME

### Executive Summary

This proposal provides a summary of the Resident Services Programme, as outlined in more detail in the Project Workbook attached at Appendix 1. WBC is entering a phase where it is focusing on core service delivery. The proposed investment is targeted at our critical service areas ensuring they are delivering effectively and efficiently by investing in necessary technology, skills and service redesign. Not investing will cause services to fall further behind in achieving their aims and intended outcomes.

This programme will deliver against the Woking For All Strategy 2022-25 supporting the outcomes of healthier, engaged, greener and prospering communities. It delivers against the Digital Strategy 2022-25, in particular Theme 1: Smart People and Theme 3: Smart Council, which outline the importance of excellent online services, and improved telephony and face to face for those that need it. It also contributes towards the eight Directions as part of the Improvement and Recovery Programme, in particular Direction e) An action plan to reconfigure services. It will become the key driving force behind the Organisation and Service Redesign Theme.

As a Council WBC has traditionally under resourced digital and transformation activity relative to our peers. This three-year programme aims to address this, deliver better services, and deliver a return on investment. The aim is to keep costs as low as possible, adopting what has already been built and learned in the sector, whilst making the most of recent technology innovation and meeting raised resident, partner, and customer expectations.

### Recommendations

The Executive is requested to:

#### RESOLVE That

- (i) the Programme Workbook, attached at Appendix 1 to the report, be agreed, with explicit reference to the Capital Receipts budget approved for Resident Services Programme, of £700,000 capital in 2024/25 - 2025/26, to replace the current technology underpinning the web publishing platform, [www.woking.gov.uk](http://www.woking.gov.uk); upgrade telephony and contact centre offer; and upgrade the customer facing platforms, as outlined in the Resident Services Programme Workbook; and
- (ii) to note the additional £350k revenue to deliver the aims of the Workbook - £175,000 from Flexible Use of Capital Receipts, £175,000 from ICT Revenue budget over the period 2024/25 - 2025/26 as outlined in the Workbook.

### Reasons for Decision

Reason: To ensure WBC has the technology, design and delivery infrastructure and capability in order to upgrade and maintain effective resident services.

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The Executive has the authority to determine the recommendation(s) set out above.

- Background Papers:** Resident Services Programme Workbook (Appendix 1)
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### 1.0 Introduction

- 1.1 The specific outcomes that the Resident Services project will deliver on are two-fold: financial savings and improved customer/resident experience.
- 1.2 This will be achieved through transformation of the customer-facing services of WBC, and a new culture and front to back operating model that supports our 'front door'. To achieve this, investment is required across people (skills and behaviours) process (end to end service design) and technology (including infrastructure and data). All three are critical, however this paper focuses particularly on how investment in new processes and technology will accelerate WBC objectives.

### 2.0 Background

- 2.1 Through the Digital Strategy 2022-25 and more recently the Improvement and Recovery Programme, the Council has committed to improving its online services, to ensure the needs of residents, businesses and communities are met as efficiently as possible. Currently, it is not possible to make changes quickly and easily to online user journeys via [www.woking.gov.uk](http://www.woking.gov.uk) and this is limiting the ability to provide effective council services. The content management system, and therefore the website, is out of support from January 2025.
- 2.2 The Council has multiple entry routes, which have an inconsistent approach to technology for publishing platforms and a lack of consistent design standards. There are multiple pages, often multiple sites with overlapping and inconsistent ways for users to resolve issues. This confusion results in failure demand (users contacting the Council unnecessarily), which reduces user satisfaction and increases cost.
- 2.3 There is no single solution that will solve this problem instantly. The Council needs to commit to an approach that brings consistency, builds capability, and strengthens governance.

### 3.0 Web publishing proposal

- 3.1 It is proposed that WBC replace the current technology underpinning the web publishing platform, [woking.gov.uk](http://woking.gov.uk) and establish a new approach to web publishing. Our current platform (Drupal 7) reaches end of life at the end of 2024, so must be replaced this year. Furthermore, by committing to a new web publishing platform for the future and consolidating a large proportion of the Council's websites, this project will form a first step in the delivery of the technology and digital strategy, by providing a single flexible, cloud-based publishing capability that will meet the needs of Woking's citizens in the long term.
- 3.2 Technology decisions were made at the time of the initial launch of the Council's website, based on the current organisational and sectoral knowledge. The applications to run the website are hosted on third-party cloud infrastructure and managed by the ICT and Digital teams. The strategy at the time was to increase the in-house software development and operations capability to support the platform. In recent years, a small and dedicated team have been working to overhaul the website but they require significant investment in the technology in order to achieve the required changes.
- 3.3 It is proposed that the Council move its web publishing technology to the [LocalGovDrupal](#), platform an open source publicly owned asset, built and maintained by a community of developers, designers and digital leaders in the UK and we will benefit from:
  - being part of a project in active development, with multiple local authorities contributing new features and updates
  - a healthy supplier market to host, maintain and support the website

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- growing our internal capability and capacity to provide strategic direction and continuous improvement to the main woking.gov.uk website and other microsites

3.4 The Council will carry out a mini competition and call off from a Crown Commercial Services framework to appoint a specialist supplier to:

- work with the Transformation, Digital and Customer Services teams to migrate woking.gov.uk to the LocalGovDrupal platform
- host and maintain the Council's core LocalGovDrupal platform
- carry out development work on templating and feature implementation

3.5 The contract will cost up to £350,000 over two years. Following completion of a mini competition, the Head of Transformation, Digital and Customer Services (reporting both to the Improvement and Recovery Board; and Corporate Programme Board) will award the contract.

### 4.0 Telephony Proposal

4.1 WBC's current telephony system incurs high hardware and maintenance costs. To address this, softphone technology leveraging Microsoft Teams has been investigated as a possible best value option. It is therefore proposed that WBC replace the current technology underpinning the Council's telephony.

4.2 Softphones can eliminate the need for expensive hardware. Unlike traditional desk phones, which can be expensive, softphones require no additional hardware and have lower long term running costs. Softphones can be easily installed on existing devices, such as laptops or desktop computers, reducing the need for additional hardware or ongoing maintenance.

4.3 Softphones allow employees to make and receive calls from anywhere with an internet connection. This means that employees can work remotely, travel, or work from different office locations, without the need to forward calls or use a separate mobile phone. This improves productivity and allows for greater flexibility in scheduling and work arrangements. It also aligns with our approach to Bring Your Own Device (BYOD), as staff can take calls via Microsoft Teams on their own device once it has been enrolled in our Mobile Device Management (MDM) service.

4.4 The technology supports collaboration. It can be integrated with other communication tools such as email, instant messaging, and video conferencing. This allows employees to have all their communication tools in one place, improving efficiency and reducing the need for multiple applications. This would improve the service provided by the Contact Centre, enabling them to adopt an omnichannel approach, and to have a clearer view of cross organisation availability, more effective 'hunt groups' and higher levels of call resolution for residents.

4.5 The Council will carry out a procurement exercise to appoint a specialist supplier to:

- Work with the Transformation, Digital and Customer Services teams to upgrade the Council's telephony and contact centre functions
- Move the functions to the Cloud.

4.6 The contract will cost up to £150,000 over two years. Following completion of the procurement exercise, the Head of Transformation, Digital and Customer Services (reporting to Improvement and Recovery Board and Corporate Programme Board) will award the contract.

### 5.0 Customer facing platform proposal

5.1 In the context of local government, implementing a customer facing platform (such as a Customer Relationship Management or CRM function) offers several significant benefits (more information about which is included in the Workbook attached at Appendix 1):

- Improved customer service
- Enhanced accessibility and inclusion
- Efficient service provision
- Data-driven decision making
- Transition to a customer-centric approach
- Management of complex interfaces.

5.2 Customer facing platforms will improve our ability to manage cases and customer flow throughout customer services as well as how work is allocated, how we analyse volumes and service satisfaction.

5.3 The Council will carry out a procurement exercise to appoint a specialist supplier to work with the Transformation, Digital and Customer Services teams to help process WBC's highest volumes of queries in customer services: council tax, planning and housing.

5.4 The notion of a single CRM for all services is outdated, given the complexity of service areas and the failure of one size fits all models of technology to adequately meet user needs. However, as part of the customer facing platform aspects of the programme, the use of our key line of business applications will be better understood and suppliers challenged. Delivering improved integrations across different applications will be critical to ensuring services are delivered effectively end to end and performance and cost can be monitored.

5.5 The discovery work and contract will cost up to £200,000 over two years. Following completion of the procurement exercise, the Head of Transformation, Digital and Customer Services (reporting to Improvement and Recovery Board and Corporate Programme Board) will award the contract.

### 6.0 Organisational Design and Development

6.1 Successful implementation of the above products and services, requires whole organisation redesign and behaviour change. Without these, the benefits of digital transformation will not be delivered.

6.2 Organisational design and development focus on improving processes, structures and systems with a particular emphasis on staff engagement and development. It embraces a culture of innovation and adaptability that allows organisations to build resilience and respond effectively to changing contexts.

6.3 Service redesign will focus in the first instance on higher volume areas of customer queries: Revenues, Benefits, Customer Services and Housing, but with a view to ensuring an improved website, online services, telephony and customer relationship management benefits all service areas.

### 7.0 Expected Impact

- 7.1 Moving to a managed service model aligns with our digital strategy, increasing our resilience and growing our skills in-house. To ensure the new web platform and telephony are implemented as expected, a team comprising employees from Transformation, Digital and Customer Services teams will need to be established for the full two-year duration of the implementation phase. The majority of cost will be drawn from flexible use of capital receipts assigned to the Organisational and Service Redesign Programme as well as current revenue budgets.
- 7.2 As we progress through the work, our insights, including more detailed costs and benefits will become more measurable. Updates to the programme will be made quarterly and presented at future Corporate Programme Board meetings and reported to Full Council as appropriate.
- 7.3 Between January and April 2023 WBC engaged a partner to better understand housing management, customer services, revenues and benefits. The key findings were:

#### 7.3.1 Overarching resident services

- The need for a programme of channel shift to online
- Upgrade the website and rewrite content
- Explore and design a 'single view of debt' approach
- Redesign the 'moving to Woking' experience
- Improved telephony and IVR (Interactive Voice Response) to improve telephony offer and reduce failure demand
- Improve use of current tools including Teams and Microsoft 365

#### 7.3.2 Housing

- The need to design into end to end journeys for repairs, end of tenancy and void turnaround processes
- Greater provision of online housing advice
- Redesign applying and bidding user journeys

#### 7.4 Quick win actions already in place include:

- Content redesign to reduce confusion and failure demand (contacting WBC unnecessarily)
- Improving online forms including benefits eligibility checker
- Removing unnecessary telephone numbers and email addresses and redirecting to online forms
- Reducing customer service opening hours freeing up time to deal with casework
- Upskilling customer service staff to deal with council tax queries

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- Nudges on letters including QR codes to encourage channel shift

7.5 The programme's outcomes are to improve resident satisfaction and make savings. Our ability to monitor performance against these outcomes will be limited until the implementation of the digital functionality for which this programme is responsible. However, there are certain metrics that we will be able to track from the start of the next financial year and we will use these to measure performance against the programme outcomes:

- Accessibility and Inclusivity – external audit carried out on the website at regular intervals. 1<sup>st</sup> planned for 1<sup>st</sup> April 2024, repeated when the new website goes live and then every 12 months thereafter. Note: this is in addition to ongoing, regular automated testing of the website.
- Customer Satisfaction – based on responses to electronic feedback form, that will also be completed in response to verbal feedback over the phone. Metrics include whether query was resolved first time, effort required to resolve query and satisfaction with outcome on scale of 1-5.
- Cost per Transaction – calculated based on number of transactions, length of time they take and cost of service. First sample to be take on 1<sup>st</sup> April 2024 and monthly thereafter.

7.6 As well as transforming services for residents, it is estimated that the project will produce revenue savings of circa £350,000 from 2025/26. The level and timing of the savings will be dependent on a number of factors. The £350,000 is the equivalent of 7FTE including on costs. This is in addition to savings of £191,000 already achieved, predominantly from staffing reductions across Revenues, Benefits and Customer Services.

## 8.0 Corporate Strategy

8.1 As referenced in the Executive Summary above, this programme will deliver against the Woking For All Strategy 2022-25 supporting the outcomes of healthier, engaged, greener and prospering communities. It delivers against the Digital Strategy 2022-25, in particular Theme 1: Smart People and Theme 3: Smart Council, which outline the importance of excellent online services, and improved telephony and face to face for those that need it. It also contributes towards the eight Directions as part of the Improvement and Recovery Programme, in particular Direction e) An action plan to reconfigure services. It will become the key driving force behind the Organisation and Service Redesign Theme.

8.2 The Improvement and Recovery Plan is a requirement of the intervention from the Secretary of State, and its primary focus is to drive the transformational change required to support recovery. It is divided into 5 Themes.

8.3 The strategic aim of Theme 4 (Organisation and Service Redesign) of the IRP, is to 'deliver a smaller, data driven organisation, where staff feel empowered, digitally confident, and delivering on key priorities.'

8.4 Within this, the Resident Service workstreams are designed to meet Objective 7, to 'move customer-facing services online to deliver further efficiencies and improved customer service.'

## 9.0 Implications

### Finance and Risk

9.1 £700k Capital Expenditure.

9.2 £350k revenue expenditure.

9.3 Revenue savings of £350k emerging from 2025/26.

Equalities and Human Resources

9.4 We anticipate that the changes to customer services will have positive impacts for groups, who will benefit from broader (and more equitable) ways to contact WBC.

9.5 The range of accessing WBC will include more traditional approaches (e.g. telephone helpline hours) for those who are less digitally confident or enabled.

Legal

9.6 This paper has been reviewed by Legal Services who have not raised any issues.

**10.0 Engagement and Consultation**

10.1 Soft market testing with over 20 suppliers and engagement with over ten local authorities on best practice and value for money was undertaken in the autumn 2023 a shaped the scope of this work.

10.2 The Project Workbook was reviewed and agreed by the Corporate Leadership Team and Commissioners in January 2024.

10.3 The approach to market was reviewed and agreed by Commercial and Finance Governance Board in February 2024.

REPORT ENDS