CRM enhancement

Decision Paper

Online Customer Experience Project

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1. Purpose of this document

This document assesses our current ICT capability in the light of our '2020 vision' for the provision of customer services. It then:

- Considers this assessment in respect for our existing ICT estate, and identifies the implications for our use of the Customer Relationship Management (CRM) system
- Identifies two principal gaps in our current ICT capability, and considers a range of options for addressing the first of these
- Recommends to the Programme Board a preferred option, that will be the subject of a Cabinet report requesting investment funding

The Board is requested to note and comment on the analysis presented in the document, and approve the request to Cabinet for investment funding.

2. Executive Summary

This document considers the Council's current level of ICT capability in the context of the objectives of the On-line Customer Experience Project, identifies gaps in capability and looks at the options available to bridge some of those gaps. A summary of each Section is set out below.

Section 3 – Vision reminder

- Reiteration of the 2020 vision previously agreed; this forms the basis of the development of this document

Section 4 - The 2020 vision and use of Customer Relationship Management systems

- Notes background research that validates the 2020 vision and in particular the 'One Process' approach to transactions (where there is one underlying customer journey process however the customer actually accesses that service – whether through the website, via the contact centre or by visiting customer services in person)

- Concludes that to achieve a 'One Process' approach in line with the vision, all transactions should be routed through a single Customer Relationship Management (CRM) system.

Section 5 - Selection of CRM system

- Acknowledges that various CRM solutions are available to the Council but concludes that Lagan should be accepted as the Council's CRM solution over the lifecycle of the current release (largely reflecting recent investment in the upgrade)

Section 6 - Existing and required ICT capability

- Identifies the key gaps in our existing ICT capability:
    - Enhancements required to the CRM system allowing transfer of structured data, customer identification and authentication
    - 'Middleware' that will join up the CRM system with the Council's array of back office systems
- Notes that the proposed investment in the CRM enhancement is only part of the bigger picture – which requires investment in middleware to complete
- Links proposals to the ICT strategy

Section 7 - Options appraisal – CRM enhancement

- Considers four options for the enhancement of the Lagan CRM system
    - Do nothing
    - Solution based on existing Capability
    - Enhanced solution – acquire additional Lagan modules
    - Enhanced solution – acquire equivalent modules from an alternative vendor

Section 8 - Options appraisal – summary

- Concludes that Option 3 – an enhanced solution created by the acquisition of additional Lagan modules - is preferred (and recommended to the Board as the Option to progress)

Section 9 - Actions and next steps

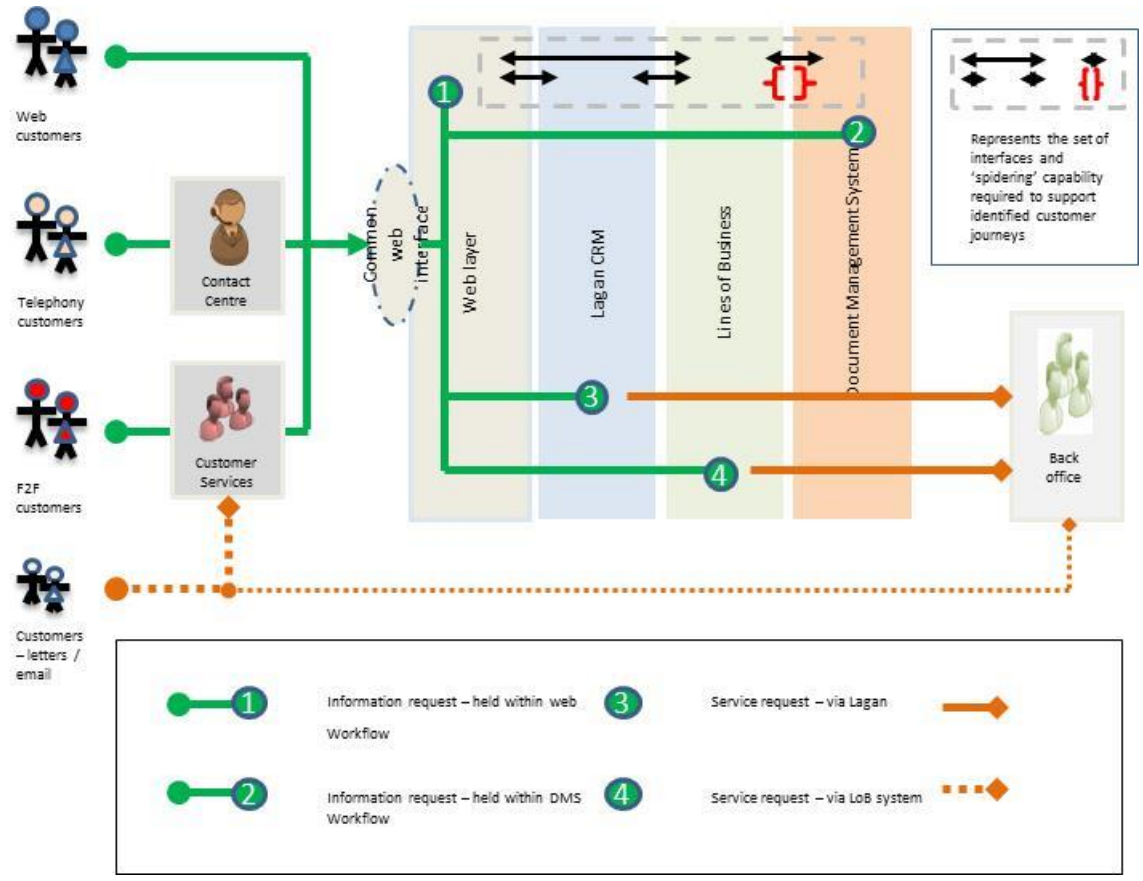
- (Assuming that the Programme Board accepts the Project team's recommendations) Prepare a Cabinet report requesting funding for implementation costs – these are estimated in the order of £150k but would be recouped over future years
- Prepare detailed plan for next phase of work

Section 10 - List of appendices

3. Vision Reminder

The diagram below illustrates the 2020 Vision previously agreed by the Customer Services Programme Board.

The 2020 vision



The key aspect of the vision is that the website[1] is to be our principal and preferred way of doing business (where use of the website is appropriate)

- This requires a major change in our thinking; customer services need to be (re)designed from this standpoint
- We need to achieve a scenario where customers prefer to use the website – ie. this will be 'channel shift'

Other features of the vision are that:

- Default access of our services is through the website (or otherwise on-line) – but, for customers who cannot, or prefer not to use the website (or other

[1] Note on use of language. Where we refer to 'on-line' customer services, or accessing customer services through the website, this should be read to include digital communications generally – and possibilities such as the creation of Council 'apps' or access to services via social media.

methods of accessing services digitally), their access to services will be facilitated by the Customer Service and Contact Centre teams using the same underlying digital process – the 'One Process' approach

- Customer Service and Contact Centre Teams become in effect super users of the website
- There will be much greater use of 'forms' which allow transfer of structured data, and less (or none) emails and letters

4. The 2020 vision and use of Customer Relationship Management systems

The Project team has conducted research (outlined at Appendix A) which has validated the 2020 vision (in that it is very much in line with what other Local Authorities are trying to achieve) and considered the technological implications of delivering the vision. This concludes that to achieve a 'One Process' approach in line with the vision, all transactions should be routed through a single Customer Relationship Management (CRM) system.

If this is not the case then we will have separate processes for transactions carried out via the website, face to face (Customer Service team) or by telephone (Contact Centre) – contradicting the vision. We would also not be able to have a single view of customer details and consequently when customers make follow up enquiries or progress chasing issues we would find it difficult to assist them as we would not have a single customer database to refer to.

At present the use of CRM within the Council is almost entirely linked to the handling of telephone calls through the Contact Centre. .A number of Services handle incoming calls themselves and do not use either the Contact Centre, or the underlying CRM system. Going forward, it should be noted that whilst the vision requires capture of customer service requests using a CRM system, there is *no* specific requirement for calls to be handled by the Contact Centre and Services could still handle their own calls if this was considered most appropriate. Generally, it would be expected that business processes supporting each customer journey are reviewed as the technology building blocks are put in place with a view to developing an excellent on-line customer experience and process efficiencies.

The implications of not following the 'One Process' approach would continue to leave the Council with a fragmented solution to customer service and no single repository for its data. Whilst some development of the Council's on-line customer services could occur without a One Process approach this development would be piecemeal and prove difficult and / or expensive to upgrade and

maintain in the medium term, due to the inevitable patchwork of processes and technologies that would be use[2].

5. Selection of CRM system

In 2015 the Council concluded that we should upgrade our existing CRM system, known as 'Lagan', and, following a recent corporate acquisition, provided by Verint, a US-based software house. The CSP Programme Board was party to this decision, which was taken on the following basis:

- The pre-existing system had not been upgraded since 2008 and as such was causing problems when faults or issues were raised; in particular, vendor support for that version of the software was ending
- It failed to meet certain PSN (Cabinet Office) requirements; in particular the version of 'Java script' embedded within the software was deemed insufficiently secure for a PSN environment
- The new system offered added functionality
- The upgrade allowed a move to a more robust server environment (thereby increasing resilience)

In theory the Council need not stick with Lagan but could select an alternative CRM solution. However, procuring an alternative CRM system would be expensive, and would include the write-off of the cost and effort recently expended on the Lagan upgrade. Acquiring an alternative CRM would require an OJEU procurement with all the associated costs and extended timeframe. In addition to the expenditure required to implement a new CRM, there are also other implications, such as the IT infrastructure to support setting up of a new system, dual running and costs of two systems during the migration and conversion stages and possible disruption to services.

It is accepted that a formal appraisal, from a starting point of a 'blank sheet of paper', could have produced a preferable CRM solution for the Council than Lagan. However, to conclude that remaining with Lagan over the lifecycle of the existing version of the system is a reasonable decision can be justified on the grounds that:

- Lagan has been, and remains, a common system in use across the public sector

[2] This would also contradict the forthcoming ICT strategy

- The recent acquisition by Verint suggests that the Lagan product was sufficiently attractive to justify investment by a major technology company[3], and that there will be future investment in the product
- Recent investment of cost and time in the recent upgrade

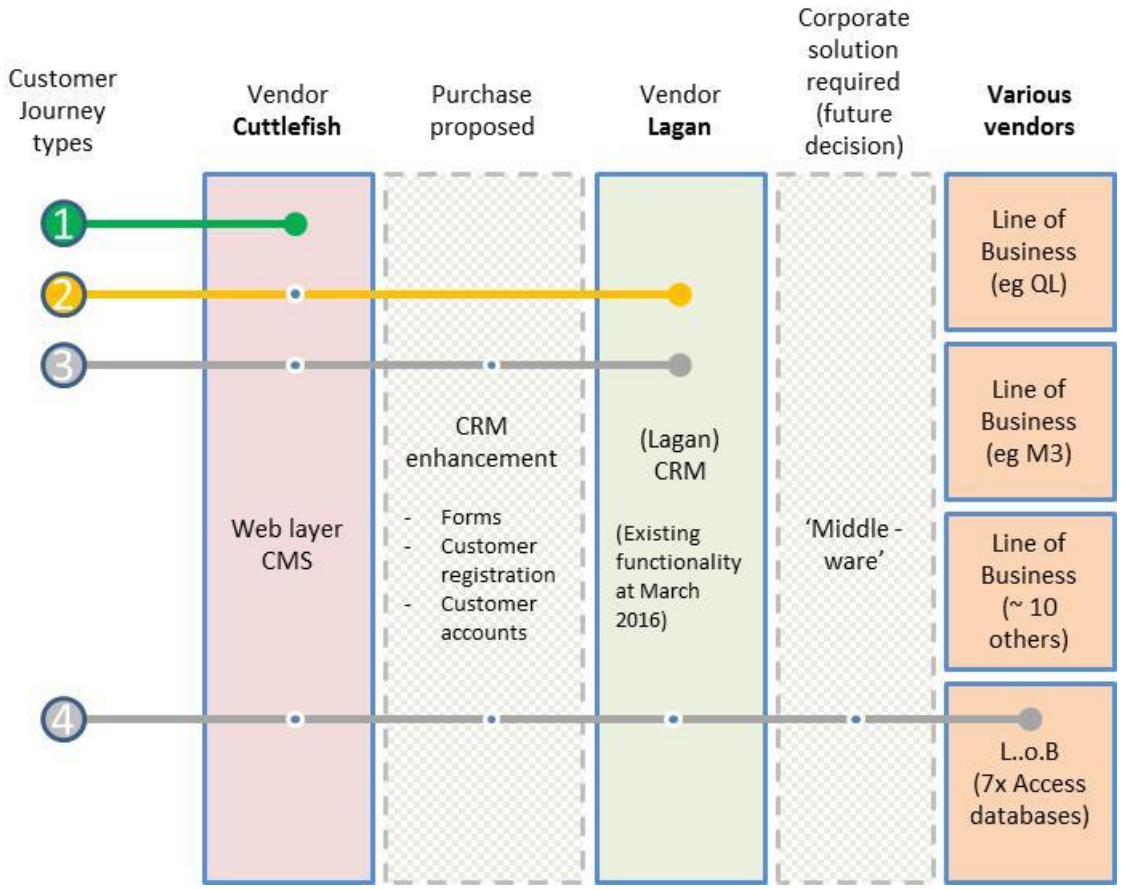
This document therefore recommends that the Lagan CRM system is retained (and thereby becomes a platform for investment over the lifecycle of this release[4]).

[3] Verint is quoted on the NASDAQ exchange
[4] The forthcoming ICT strategy envisages a holistic review of all the Council's major systems with a view to adopting a more standardised and consolidated approach from c2020, at a time when we will be approaching the end of the lifecycle of existing releases

6. Existing and required ICT capability

The Council's existing systems and future requirements are represented in the diagram below.

Existing and future ICT capability



At present - April 2016 - the Council has in place the following systems (represented by blocks with a continuous outline):

- A website together with the associated content management system (CMS) provided and supported by Cuttlefish; the Website Development Project within the CSP has seen investment in a new look and feel, and resources applied to the content of individual web pages
- A Customer Relationship Management (CRM) system (known as Lagan but now owned by Verint); the upgrade of this system was completed in March 2016
- Various back office, or 'Line of Business' systems; nineteen such systems have been identified, such as that for Housing (Aaeron / QL), Planning

(Northgate / M3), Licencing (Civica / Swift) and including seven MS Access databases

The principal gaps in the Council's existing capability are:

I. An effective 'Forms Solution'

Forms enable structured data to be transferred through a 'portal' in the website to the CRM and / or back office systems and are a key element in the 'digitisation' journey. Dealing with unstructured information, for example free form emails, typically requires manual intervention and makes delivery of a seamless on-line customer experience, and back office efficiencies, very difficult.

It should be acknowledged that the Council does use a few forms within existing arrangements. These are from a mix of vendors (Firmstep, Cuttlefish, and Lagan), typically relate to non-current technology, and have proven time consuming to design and build. Overall, the current situation is regarded as unsatisfactory.

II. Customer registration and customer accounts solutions

Customer registration describes the process by which the customer identify themselves (who they are) and authenticate themselves (they are who they say they are). Identification is required if some sort of 'personalised'[5] service is required, whilst authentication may be necessary, dependent upon whether the service request requires the disclosure of personal information (for example, where a customer wishes to view their rent statement).

A customer account allows customers to re-register more quickly for subsequent on-line visits and stores information relating to previous visits that improves the customer experience by allowing a faster transaction and / or the provision of better quality information.

Given the close linkage between customer registration and authentification, and the service request processes, an integrated solution covering both of the above requirements is appropriate. This paper proposes the purchase of such a solution which, in totality, can be considered as an enhancement to our existing CRM capability. The options appraisal and results thereof are presented in Section 7 of this document.

III. 'Middleware'

Middleware is the term used in this document to describe the mechanisms that would connect the CRM system with the Council's various back office systems and will be required to complete the on-line end to end customer journey in many

[5] In this narrative, personalised may refer to a specific person or a specific address

circumstances. The customer journey types shown within the diagram seek to illustrate the different possibilities; whilst some journeys are (or can easily be) fulfilled by a well-designed website, others require some level of customer identification and authentification, a further group require full end to end connectivity from the website through the CRM and into back office systems.

In practice middleware might be a single generic solution, connecting the CRM to all (or many) back office systems, a set of interfaces connecting individual systems together, or some combination of these solutions. Inevitably, middleware has implementation, maintenance and upgrade costs, which could be expected to increase with the complexity of the ICT environment. For customer journeys with low transaction volumes it may be the case that some sort of manual re-keying is the most cost effective solution in the short to medium term.

In the medium to long term it is envisaged that, in line with the forthcoming ICT strategy, in undertaking a holistic review of all the Council's major systems the connectivity advantages of standardising and consolidating around single technologies, vendors, systems and / or databases will be considered; this will include the potential reduction or elimination of middleware.

Whilst this document does not discuss further which middleware solutions it should be noted that investment will need to be made in this area to complete many customer journeys; much of this connectivity needs to be in place before the Council can effectively start to promote channel shift, demonstrate the resultant improvement in customer service customers and realise the efficiencies arising from digitisation.

It is planned that work to identify, evaluate and implement appropriate middleware will commence in mid-2016.

7. Options appraisal – CRM enhancement

The options evaluated assume that Lagan will remain our CRM system either in its' current (recently upgraded) guise or with additional functionality.

In order to deliver a digital solution, as detailed in the vision (outlined in Section 3), it would not be sufficient to deliver a forms solution alone, a customer registration portal which allows differing levels of authentication would also be required.

Without a customer registration portal we could only use forms to record incidents –where we don't need any level of authentication i.e no name, address etc. Such examples would be reports of graffiti / dog fouling / fly-tipping

This solution would deliver an estimated 57[6] (out a currently identified 229) customer journeys.

A customer registration portal would allow 3 stages of authentication security; Stage 0, 1 and 2. These are outlined in more detail below:

Stage 0 – is as above – just a report with no need to retain names and addresses.

Stage 1 – where customers are asking us something – a question / advice / how to do something. We will need to capture their email address and possibly name and address. This is something we should encourage as this will help to meet the vision and also help to 'shape' their registration home page with news/ information/alerts that are relevant and unique to them.

This solution would deliver a further estimated 65 customer journeys.

Stage 2 – where customers may want to pay for something or look at their rent or council tax account or see some details or information we hold that would help them with their enquiry. This would require a further authentication like date of birth, mother's maiden name or similar.

This solution would deliver the remaining (estimated) 107 customer journeys.

The purchase of a forms package and customer authentication portal without interfacing to Lagan would not be recommended as if a customer reported an issue on day one and then rang us on day two to see how it was progressing the contact centre / person answering the phone in the service would have no sight of the original request.

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[6] Numbers consider levels of customer authentification only – and do not take account of additional middleware that may be required to deliver a full end to end digital solution for that individual customer journey

The following options for a forms solution have been considered

Option 1: Do Nothing

The council could choose to do nothing. This would be to continue using the range of forms we currently have in circulation (Firmstep forms, Cuttlefish forms, and Lagan version 6 forms) , using Lagan version 14R2 as the Council's CRM.

This is the cheapest option to implement as it does not require additional capital investment over and above the money currently being spent to deliver the service. However, it does not help to deliver an improved online experience or self-serve interaction for customers and does not fit in with the 2020 vision's objectives to move towards a "channel shift" environment that is "responsive to the customers expectation delivering the same level of service as they do from commercial organisations". ;

At a practical level the production of a single Lagan Version 6 (old form) can take 5 working days and then it needs incorporating within the existing website.

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Option 1 **Do Nothing**	Existing system in place using upgrade functionality but old forms not compatible with newer version No customer accounts	No capital expenditure required. No disruption to existing service. No additional License costs Would be able to make piecemeal improvements using existing solution	Current process negates ability for Customers to self-serve or interact electronically with all Council's services. The 2020 vision will not achieve its objective to provide 80% of its transactions digitally through its website. Business processes remain individual to Services and limits opportunities for the council to offer a consistent online customer experience. No improvement for internal services Would need to retain resources for the telephone scripts.	**Implementation Costs:**	£0	£0	£0	£0	£0
				Licenses: As is Achieve Forms	£25k £8k	25k £8k	25k 8k	25k 8k	25k 8k
				Interim upgrade costs:	n/a	n/a	n/a	n/a	n/a
				Ongoing cost: (Staff Already funded Split 50/50 on script flows & Forms work 3 temporary staff funded for 6 months	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte) £35k	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)
				Consultancy Cost:	n/a	n/a	n/a	n/a	n/a
				Cost **Total Cost:** **<u>£600k</u>** **Time Frame:** Commence immediately	**£148**	**£113**	**£113**	**£113**	**£113**

Option 2: Upgraded Lagan 14R2 Forms and Lagan customer registration portal

Use the Upgraded Lagan 14R2 forms and Knowledge Database SolutionThe Council has recently invested in Lagan to version 14R2 and purchased the Knowledge Database Solution. This package provides an eform solution to support a wider up take of online transactions. It has the potential to allow customers, Contact Centre and Frontline staff to use and view the same eform with the Knowledge package.

Tthis solution alone would not provide customer self-serve or accounts for the Council, however, there is a customer registration portal available from Lagan (as detailed above). This has been costed into the model.

There are issues around the setup and management of the eforms in time, effort and resource to build these and they will require specialist knowledge and a skill set currently not wholly available in the Lagan Development Team.

Although this option will potentially meet a number of objectives it is unlikely, if delivered in isolation, to provide 80% of transactions digitally through the website supporting a more efficient authority and increased compliance through access to its services 24/7.

As referred to in option 1 the Council already has the Firmstep forms package and a number of Cuttlefish designed forms. Therefore any decision on a forms package needs to take into account the replacement of those forms.

Production of a Lagan14R2 form is estimated at two days and then would require JAVA skills to deliver it on the website

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Option 2 **Upgraded lagan 14R2 Forms**	New System now place New forms / reporting/ knowledge database Interfaces already in place Customer account facility	Investment in Council asset. Expansion of the existing electronic forms process imbedded in the Council. Little effort required to expand to Services that have no electronic online forms. Increased online electronic interaction for Customers with the council. The 2020 vision short term approach to Customer Journeys moderately achieved for the customers initial transaction.	No link to the current website for the Knowledge package. Solution required to link Knowledge to the website for all channels to have a single view of eforms. No interfaces to existing back Office systems that currently do not use the contact centre for calls. Lack of Interfaces means no potential for the Council to interact with the Customers providing a complete on line transaction. No single view of the customer. Does not provide Customer accounts, Bookings and payments digital solution.	**Implementation Costs:** **Portal**	£30k	£0	£0	£0	£0
				Licenses: Achieve Forms (Delivers savings in year 2 ongoing)	£25k £8k	£25k £0	£25k £0	£25k £0	£25k £0
				Interim upgrade costs:	n/a	n/a	n/a	n/a	n/a
				Ongoing cost: (Staff already funded workload below) Split 50/50 on scripting & Forms work 3 temporary staff funded for 6 months	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte) £35k	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)
				Consultancy Cost: Lagan Consultant costs + Java specialists	 £35k £15k				

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
				Contingency costs: Additional technical work	£20k	n/a	n/a	n/a	n/a
				Cost **Total Cost** **£ 668k** **Time Frame:** Commence April 2016	**£248k**	**£105**	**£105**	**£105**	**£105**

Option 3: Lagan New eforms

To procure the new Lagan eforms solution and the customer registration portal

While incurring additional costs this could potentially require lower effort option to implement, not taking account of the recent upgrade costs to the CRM system the benefits delivered to the Council are much higher than in option 2.

Used in conjunction with a Customer Registration Portal this would provide a single solution for telephony/ face to face and web. Using these new forms and the customer registration portal would provide the following business and customer benefits;

- Single Channel View – web/telephony/face to face.
- Forms designed to run on PC, Laptop, Tablet & Phone.
- Easier design process for staff
- Ability to have show/hide information based on selections made.
- Ability to make changes to forms in a more responsive manner
- Easier interfacing with other systems
- Simple styling of forms to match our website design.
- GIS integration using Google Maps.
- Attaching files (images plus commonly used document formats).
- Partial save capability.
- Forms have a detailed future roadmap

Customer Benefits

- Works on any hardware e.g. phone or tablet etc.
- Easy to follow menus and status when in process of completing form making complex processes easy to follow
- Helpful visuals like embedded mapping
- Can do partial save – to either come back to themselves and or to refer to if needing to call to speak to an agent who can then see same partially completed form
- Same form is used by both the agent and the customer – if in slightly different formats/presentation – thus agents could help the customer or complete for them… digital first, not digital only but still a way of encouraging customers to try for themselves over the web

Lagan have suggested that these forms can be produced within one day and then would require JAVA web skills to launch on the website. Within this model it is proposed that the existing forms (Firmstep, Cuttlefish and Lagan V6) be converted to the new Lagan forms

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Option 3 **Lagan New eforms**	New eforms module required Drag n Drop functionality Less complex processes Ability to link with customer account module	Can provide full eforms, CRM and Customer Portal solution. Continued Investment in Council asset. Ability for Customers to self-serve or interact electronically with all Council's services. The 2020 vision will be realised for transactions digitally through its website. Ability for all channels to have a single view of eforms. Provides savings on existing achieve form package and cuttlefish forms Enables digital solution to support Customer accounts. Within this option is the possibility to significantly improve Business processes.	Increased costs in comparison to options 2. No new interfaces to existing back Office systems. Lack of interfaces means no potential for the council to interact with Customers providing a complete on line transaction. No single customer view.	**Implementation Costs:** Forms Portal	 £22k £30k				
				Licenses: Lagan – may reduce in line with below Ongoing costs for new modules – annual software costs	£25k	£25k £15k	£25k £15k	£25k £15k	£25k £15k
				Interim upgrade costs:	n/a	n/a	n/a	n/a	n/a
				Ongoing cost: (Staff Already funded) Split flows & Forms work 3 temporary staff funded for 6 months	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte) £35k	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£25k (1 fte) £25k (1 fte)	£25k (1 fte) £25k (1 fte)	£25k (1 fte) £25k (1 fte)
				Consultancy Cost: Lagan Consultant costs + Java specialists	 £35k £15k	n/a	n/a	n/a	n/a

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
				Contingency costs: Additional technical work	£20k	n/a	n/a	n/a	n/a
				Cost **Total Cost** **<u>£577k</u>** **Time Frame:** Commence end of May 2016	**£278k**	**£120k**	**£65k**	**£65k**	**£65k**

Option 4: I Achieve eforms and procure the Firmstep Customer Registration Portal

Lagan would remain as the CRM but forms would be provided by Firmstep and their customer registration portal would provide the authentication.

This option would require additional integration work interfacing Firmstep forms to Lagan V14R2 which leads to greater cost.

This option could potentially deliver a high level of benefits to the council, however the price paid for the service solution over a number of years may end up being greater than the costs to implement the system, and so may not deliver value for money.

The fit with the ICT strategy is not as attractive as there is a reliance on the third-party service provider and that integrating future digital and electronic applications could be more difficult and more expensive as it is outside of the council's direct control. It can often be the case that where this kind of integration is undertaken it can be difficult to isolate where any faults / problems/ issues actually arise.

In addition, to achieve the 2020 vision we we would require the Firmstep Customer Registration Portal to interface with Lagan.

There are no timeframes available in relation to production of forms or integration to Lagan.

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Option 4 **Integrate Achieve eforms with lagan**	Some functionality already in place Customer Account facility required	Can provide full eforms solution Investment in Council asset. Ability for Customers to carry out initial transaction through the Councils website.	Same as in Option 3. Increased Implementation timescales? Continue to have separate channels for lines of business. No Customer Account function included Minimal knowledge of the product - 1 resource	**Implementation Costs:** Integration with Lagan + additional interface work with Serco Quadron Streetsmart and sentinel Achieve Forms package Lagan Portal Integration from Firmstep to Lagan	£90k £11k £30k £15k	£0	£0	£0	£0
				Licenses: Lagan Achieve	£25k £14k	£25k £14k	£5k £14k	£5k £14k	£5k £14k
				Interim upgrade costs:	n/a	n/a	n/a	n/a	n/a
				Ongoing cost: (Staff (3 fte) Already funded) Split 50/50 on script flows & Forms work	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£80k (3 fte) £40k (1.5 fte) £40k (1.5 fte)	£25k (1 fte) £25k	£25k (1 fte) £25k	£25k (1 fte) £25k

				The options presented have variable complexity and cost and assumes a start date at the end of April 2016.					
	Functionality	**Pro's**	**Con's**	**Costs**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
				3 temporary staff funded for 6 months	£35k		(1 fte)	(1 fte)	(1 fte)
				Consultancy Costs:	£50k	n/a	n/a	n/a	n/a
				Contingency costs: Additional technical work	£20k	n/a	n/a	n/a	n/a
				Cost **Total Cost** **£606k** **Time Frame:** Commence June 2016	**£339k**	**£119k**	**£39k**	**£39k**	**£39k**

8. Options appraisal - summary

Based on the options appraisal, ***'Option 3 – Lagan new eforms'***, is the preferred solution.

Looking at the whole life cost of this option over five years appears not to offer any significant cost disadvantages over simply continuing with the status quo, although an up-front investment of approximately £150k will be required to implement the solution. This investment will be recouped over time via productivity savings within the existing Lagan team.

Compared to Options 1 (Do nothing) and 2 (14R2 forms), Option 3 offers much greater functionality and opportunities to improve the customer experience. Option 4 (the Firmstep option) would offer equivalent functionality and opportunities, but given our existing Lagan CRM this Option would increase the complexity (and therefore cost) in our current ICT environment.

9. Actions and next steps

If the Programme Board is accepting of the direction of travel described in this document and approves the progression of Option 3 the envisaged next steps are:

a. Prepare a Cabinet paper requesting the investment funding to progress enhancements to the Council's CRM system as described under Option 3; we will also address the requirement to reflect the investment in the regular Cabinet reports covering Capital Plan and Procurement amendments

b. Prepare a detailed plan covering the next phase of work which will cover, inter alia:

    i. Engagement with services to create a timetable for the (potential) redesign and implementation of on-line customer journeys

    ii. Identification, evaluation and development of business cases for the creation of middleware to cover the majority of end to end customer journeys requiring this technology

c. Activity in accordance with the plan (above)

d. (It is anticipated that the detailed plan would be presented for review at the next Programme Board)

10. Appendices

Appendix A: Note on background research

Appendix B: Current Customer Journeys – circulated separately

Appendix A: Background research

In developing this paper the Project team has considered trends and research carried out in support of online transactions carried out by reputable organisations. Light engagement has taken place with a number of the council's service areas to provide information to support the implementation of the online customer journeys. A plan for more detailed consultation with customers will be developed in conjunction with Services assuming the Programme Board ratifies the approach set out in this document.

The Project team have received presentations, held conversations and attended open days with our current system suppliers Verint and Firmstep. In addition, channel shift open day events were attended at various venues taking the opportunity to look at what other authorities are doing. These were all useful in helping the projects approach in terms of the best solution for Charnwood. A summary of findings were:

(i) Increasing online eforms alone will not make an immediate major impact but will achieve the aim to have more of the council's services accessible on-line. However by looking to standardise business process is likely to achieve greater benefits for the customer and the Council - implying increased use of the CRM System.

(ii) To enable a standardised process for all channels (face-to-face, telephone etc.) our front of house and back office staff should have the same view as the customer on the website.

(iii) The Council should consider maximising use of the current CRM[7] with a view to building an end to end automated process, including the use of a customer registration process allowing customers to self-serve.

[7] This is the inevitable view of Verint – our current CRM vendors – but the concept of creating end to end automated processes to maximise the benefits of new technology is consistent across the various events attended