MEETING	Corporate Scrutiny Committee
DATE	16 February, 2017
TITLE	Self-service Project
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Background

An increasing number of customers expect to be able to contact the Council to request a service or find information at a time that is convenient for them, which is usually outside the traditional 09:00-17:00 office hours.

Despite having to face significant savings over the next few years, the Council will continue to deliver the majority of services to customers. Offering as much as possible of those services through self-service will improve the experience and service for the customer, will be more cost effective and will therefore give residents better value for money.

Gwynedd Council has therefore committed to undertake a self-service project that will change the current pattern of service provision for customers in future, and will encourage customers to use self-service.

The Scrutiny Committee's Questions

Here are the answers to specific questions raised in advance by the Scrutiny Committee.

I. **Explain what the self-service project is and the work programme for the project. What progress has the project made so far?**

The aim of the self-service project is:

1. To give the customer a choice of how to contact the Council with a request for service.
2. To encourage the customer to create a self-service account – 'My Account' – in order to make applications for services electronically as it will offer them a better service, and will be a cheaper method of providing the Council's services.
   The GOV.UK website announced their processing costs for booking a driving test online in 2015-16:
   £6.62 – face to face
   £4.11 – phone
   £0.22 – the web

   Even though these costs cannot be used to set savings targets for Gwynedd Council, they do highlight why it's essential that we as a Council try to guide as many customers as possible away from phone and face-to-face, to online contact.

3. To enable customers to track their applications for services meaning they will not need to phone / call in to receive an update on their applications.
4. To enable customers to gain access to all of the Council's electronic services by logging in once – referred to as 'single sign-on', i.e. they will not need to have different log in details for every service the Council has to offer.

In order to achieve these aims we are:

1. Developing a new Customer Relationship Management System internally, that will replace the current system (SIEBEL).
2. Intending to redirect Galw Gwynedd staff's time to enable the promotion of self-service and deal with self-service enquiries over the phone and using 'web chat'.
3. Intending to redirect Siopau Gwynedd staff's time to be more interactive with customers and to encourage them to use self-service either at home or via assisted digital (assisted by customer advisors) in Siopau Gwynedd.
4. Intending to market the services in a way that's appropriate for the target audience.

The Project's work programme

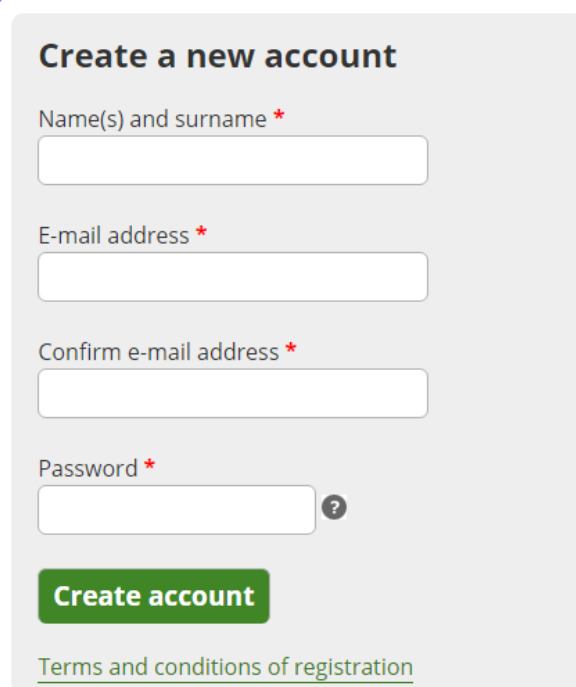There are 7 main elements to the work programme:

1. Develop a new Customer Relationship Management System step by step as new online services are introduced.
2. Transfer all of the present processes that are available over the phone in Galw Gwynedd to the new Customer Relationship Management System and in doing so, ensure that every process suited to self-service is introduced online.
3. Transfer self-service forms available on the website but not linked to 'My Account', into 'My Account', enabling customers to track their requests for service (some of the present forms will be deleted from the website if deemed unnecessary having assessed whether they are still relevant).
4. Develop new self-service forms in 'My Account', e.g. Garden waste collection application.
5. Connect 'My Account' to external systems providing self-service, where it is more cost effective to so rather than developing an internal system, e.g. a system for joining Leisure Centres and hiring sessions at Leisure Centres.
6. Provide guidance for Galw Gwynedd and Siopau Gwynedd staff on how to encourage self-service and assist customers to create accounts.
7. Targeted marketing of services, i.e. market in a way that is relevant to the target audience.

The new services to be introduced over the next few months are:

1. Scaffold application for businesses
2. Skip application for businesses
3. Order recycling and waste equipment
4. Enquire / complain about the waste and recycling service
5. Report a missed recycling / waste collection
6. Order a bulky waste collection
7. Join a Leisure Centre
8. Book a session at a Leisure Centre
9. Pay for school lunch
10. Apply for school admissions
11. Apply for a school transfer
12. Report highway problems , e.g. broken street light, potholes, broken pavement

The project's progress to date

1. New Customer Relationship Management System has been developed and is now live
   i. back office system for self-service online
   ii. operational in Siopau Gwynedd and Galw Gwynedd for recording service requests
   iii. back office system for new online processes, e.g. garden waste collection requests
2. Creating an account 'My Account' has been simplified and is now live
   i. You only need a name, e-mail address and password to create an account

Create a new account

Name(s) and surname *

E-mail address *

Confirm e-mail address *
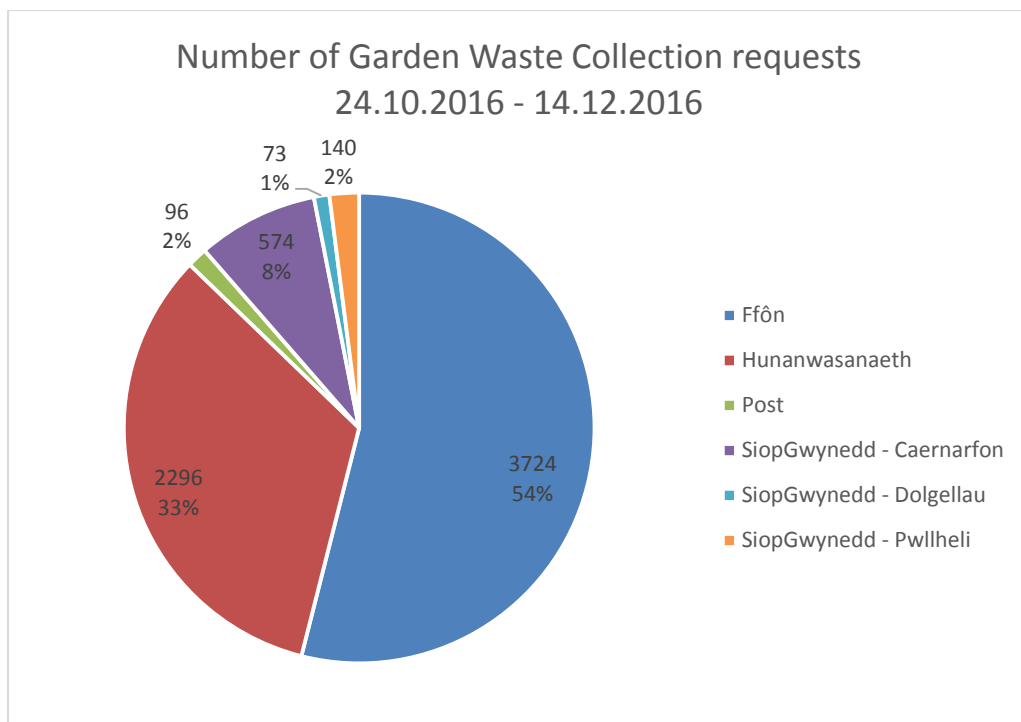
Password * ❓

Create account

Terms and conditions of registration

3. The first process using the new CRM – Ordering and paying for a Garden Waste Collection – went live on 24 October 2016

Number of Garden Waste Collection requests
24.10.2016 - 14.12.2016

- 73 1%
- 140 2%
- 96 2%
- 574 8%
- 2296 33%
- 3724 54%

Legend:
- Ffôn
- Hunanwasanaeth
- Post
- SiopGwynedd - Caernarfon
- SiopGwynedd - Dolgellau
- SiopGwynedd - Pwllheli

4. The number of self-service accounts in the period since introducing the first process using the new CRM has increased

1. **Number of accounts before 24 October 2016:** 22647
2. **Number of new accounts created between 24 October 2016 – 14 December 2016:** 2828
3. **Total accounts on 14 December 2016:** 25475
4. **Number of logins 24.10.2016 – 14.12.2016:** 6774

Number of accounts created per month

Number of logins per month
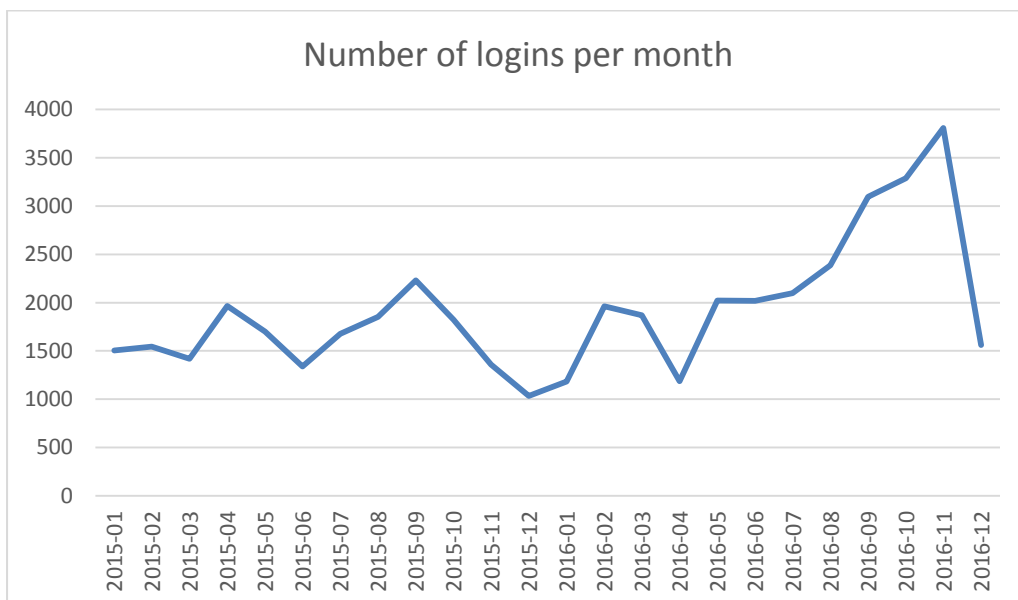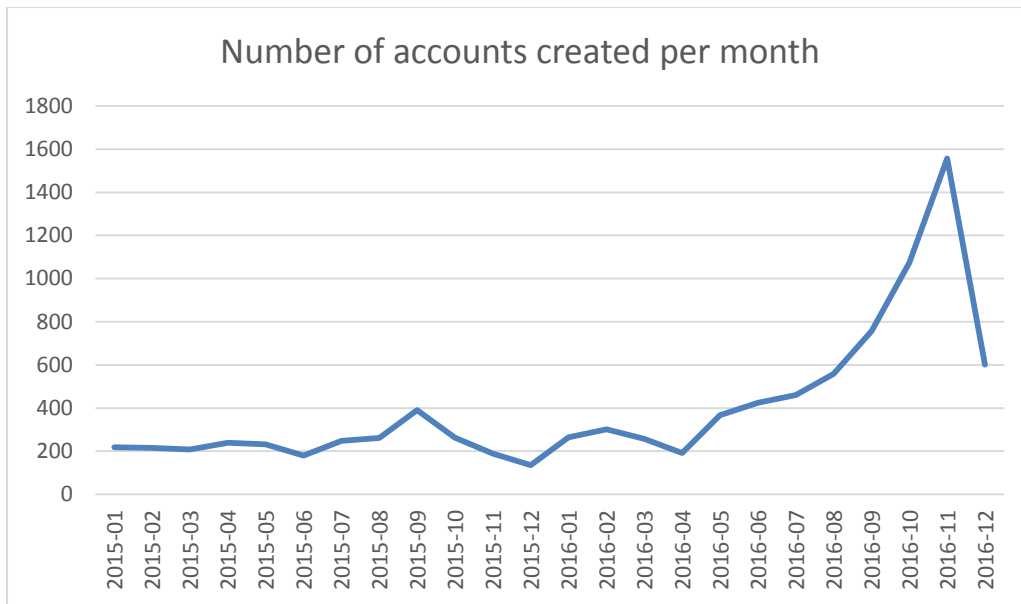
II.   What is the aim for increasing the use of self-service?

The main emphasis at the moment is to improve customer care.

The end goal is to ensure that every service that is suitable for self-service and is possible to introduce will be available on the Council website. This will take some time to achieve.

At the beginning of the project, the main criteria for prioritising which services should be introduced online are:

1. Is the target audience for the service in question likely to use self-service without the need for much encouragement

2. Are we likely to see a significant percentage of the target audience shifting from the present method of requesting a service to the self-service method

We will not be setting a target for shifting customers to self-service across all services in general, e.g. 50% of all the Council's requests for service submitted via self-service. We will work with the Departments offering the services to set targets per process, based on the process and the audience using the process.

Over a period of time, the type of services that will naturally attract a self-service audience will diminish, and target customers will require more encouragement to shift to the digital channel through marketing, changing customers' and the Council's culture and digital assistance to create accounts and submit requests.

III.   **How will you measure success?**

These are the main measures identified:

- Number of customers using self-service
- Number of returning customers using self-service
- Customer satisfaction
- Number of services on offer to customers
- Number of customers shifting from other channels to self-service
- Number of service requests Galw Gwynedd and Siopau Gwynedd can redirect to the digital channel
- Can the services make and realise savings

Many authorities have set a specific savings target for the complete self-service project, without a firm basis for setting those targets. We don't intend to do that at the outset of the project in Gwynedd, as our emphasis is firstly on improving customer service. We will be looking at savings that can be delivered per process rather than setting a target for the project as a whole.

We will also collect managerial data, e.g. number of new accounts created, number of logins, and number of requests submitted via the three channels, in order to assess success.

IV. How many services can be accessed through the digital channel to date (up to 38 services have been noted in the strategic plan)

At present, most of the self-service forms on the Council's website exist independently of 'My Account', i.e. the customer does not have to have a self-service account to be able to submit a request for that service.

In order to improve customer care, and enable the customer to track their submission (thereby avoiding a situation where the customer has to phone or call in to receive an update on their application having originally submitted it online), all self-service forms on the Council's website must be exist within 'My Account'.

The current situation is:

1. 42 electronic forms online which **don't need** a customer account ('My Account') to complete, which **does not allow** the customer to track updates to their submission – across a range of services
2. 20 electronic forms online which **do need** a customer account ('My Account') to complete, which **does allow** the customer to track updates to their submission - Planning, Pest Control and Dogs, 16+ Travel Pass, Ordering bins and recycling equipment
3. Pay Council Tax, Business Rates, Private Housing Rent and Invoices
4. A 'Where I live' system providing information for customers about services in their local area , e.g. their waste collection day, their local Councillor
5. A benefits application, benefits calculator and change of circumstances system.
6. A library system for ordering and renewing books
7. An online job application system
8. A system providing information about school / library closures in an emergency, e.g. bad weather
9. Other systems providing information: licensing register, archives catalogue, rights of way register

V. A business plan has been created in order to develop the self-service system ourselves rather than buying off the shelf – what are the implications of doing this?

1. We are ensuring that there aren't any problems with delivering services bilingually, which can often be problematic with off the shelf systems.

2. It gives us the flexibility to develop the services that our customers in Gwynedd need. We aren't forced to introduce those services provided by the off the shelf system alone, e.g. We looked at one system – Agilysis – where the main service provided by the system was housing services. Gwynedd Council wouldn't have made any use of this part of the system, as the service has been outsourced.
Such companies wouldn't develop specific services for Gwynedd Council. They regularly ask

their customers about their development needs and decide on a service development programme based on the majority's priorities. This could again mean that we would not use the services developed as a Council.

3. At the outset, developing our own system to replace SIEBEL results in more technical development work, but this work will decrease and take less time as more and more functions are developed within the new system.

VI. **What results for the people of Gwynedd are likely to derive from the project?**

1. It will enable customers to submit service requests to the Council using their chosen channel.
2. It will enable customers to submit service requests to the Council and track updates to their requests at their convenience.
3. It will enable customers to keep a record of their requests for services to the Council and a record of the Council's response, all in one place in 'My Account'.
4. Access to all of the Council's digital services will be quick and easy because they will only need to log in once to gain access to all the services available.
5. People may benefit from using self-service in future, as the costs for providing services will decrease for the Council.

VII. **What plans do you have for communicating these opportunities with the public?**

1. Marketing every process / new form individually with the target audience. The type of marketing will vary from process to process and from audience to audience. We will be working with the relevant Services and the Communications Unit on individual marketing plans.
2. Freeing up time for Galw Gwynedd's staff (by offering the services available over the phone through self-service), in order to promote self-service during phone calls to the contact centre,
   e.g. at the end of the call where the process is available online, they will make the customer aware of that and offer to create an account for them on the phone, so that next time the customer can self-serve.
3. Siopau Gwynedd staff will walk the shop floor approaching customers to find out which service they need. If it's something that can be done online and the customer is willing to self-serve in future, the staff will submit the request for them on this occasion showing them how to do so and will help create an account for them, so that they can self-serve next time.
4. Departments should encourage customers to submit an online application rather than encouraging the use of any other channel.

5. We will work with the Digital Gwynedd project staff in order to promote the use of the internet in general, and make the most of opportunities to raise customers' awareness of the online services available on Gwynedd Council's website.
6. When a substantial number of services are available in 'My Account' we will work with the Communications Unit on a marketing plan to promote 'My Account' in general, in addition to marketing specific services. This is likely to begin during the autumn of 2017.
7. Raising awareness of staff about the online services available on the Council's website using internal communication channels, so that they use them themselves and tell their friends and family.
8. Raising awareness of Members about the online services available using relevant communication channels, so that they use them themselves and make residents aware when opportunities arise.

VIII. **What problems have arisen with the system to date, and how are you solving them?**

No problems have arisen with the system so far. Because the system is being developed from scratch, the process of developing new processes can, currently, be slow at times because new functions need to be developed, e.g. the ability to have a tracked conversation between the customer and a Service. Following the initial period, when the main functions will be in place, it will take less time to develop new processes / forms.

The main problems with the project to date are:

1. **Lack of commitment by services to ensure the project is delivered on schedule**
   In order to improve this we intend to draw up an action plan for each individual project. We will explain the plan to the relevant Service beforehand to ensure their agreement and commitment before moving on.
   We also intend to attend one of the senior managers' meetings to explain the purpose and implications of the project.
2. **Opposition to single sign-on policy**
   The Services see it as a barrier and want to carry out their own individual projects, without taking into consideration what's important to the customer, namely that Gwynedd Council is one service provider and therefore you should only need one login to access all services.
   In an attempt to appease this opposition, we intend to attend one of the senior managers' meetings to explain why the policy exists, and the implications of non-compliance on the project as a whole.
3. **External companies we work with can cause problems and disrupt the project's timetable for delivery**
   e.g. 'Gladstone' - the company that provides the system for leisure self-service

doesn't currently integrate with the payment system that we use. Trying to get the company to do so is a laborious process and adds unforeseen time to the project.