Project Brief: TOM & Technology

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| **Project Name** | Resident Experience: Target Operating Model |
| **Document Date** | 04/03/2024 |
| **Document Ref** | ResExTOM\_PB\_v1 |
| **Raised By** | Kelly Page  |
| **Project Sponsor** | Mark Fowler  |

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| **Purpose of the Project**  |
| Background: * Customer services in Luton is fragmented, with multiple access points across the organisation and no insight into the performance of resident experience outside of the contact centres or the level of failure demand caused by the Council’s service design and processes.
* A Target Operating Model for customer access, strategy or a work plan to deliver against resident expectations have not progressed due to barriers in automation and lack of investment.
* No single view of the customer, with officers working on legacy systems, with no adopted central CRM that enables process flows and case notes.
* There is no customer insight function for real time contact, progress chasing, reason for contact or way to connect multiple contacts across the organisation to develop continuous service improvement opportunities.

Purpose of the project: * Map the as-is customer experience through engaging with frontline staff, key stakeholders and residents, using other forms of insight and data to identify the current demand, channel use and experience. Focus will span the whole organisation and is not limited to corporate customer services but will focus on all areas receiving inbound customer contact.
* Design a future TOM (Target Operating Model) for customer access across all channels and departments to improve the customer experience, reduce failure demand, improve resolution outcomes and efficiencies which might include; a channel access strategy, culture changes required, customer experience principles and ways of working.
* Map the technical user requirements and capabilities required to deliver the future TOM including online automation, telephony and CRM/data.

**Due to the critical dependencies between CRM/Tech options appraisal and the future TOM both projects will be covered in this project brief.**  |

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| **Project Scope** |
| **In Scope**Current state analysis, to create a map of organisational demand and access points. Measuring the customer experience and failure demand.* Produce a map of current state of demand and access points.
* Produce a set of personas and customer journeys representing the current state.
* A diagnostic report detailing the current state of demand and access to customer services, BTS and the rest of the organisation.

 TOM development to ensure the right channel for the right customer, creating efficiencies and improving customer experience:To create the TOM, we will:* Use the as-is analysis as a basis to co-design a ‘to-be’ experience for residents.
* Develop a TOM that meets the needs of residents and staff, mapping what good quality service looks like and understanding the capability required to meet and measure quality standards.
* Produce a set of performance measures and principles to guide a future model of customer access.
* Map requirements/capabilities for CRM based on user needs.
* Identify priority processes that should be eliminated, automated, assisted or holistic based on personas and user needs analysis.
* Map savings potential for new TOM – through the identification of top 10 automation opportunities through identification of:
* Failure Demand information
* High volume transactional services
* Call duration data
* After call handling duration data
* Time spent by back-office processing
* Create recommendations for new ways of working, including skills, culture and governance to deliver the principles set out in the new TOM.
* A roadmap will be developed over the duration of the programme, which will take into account dependencies and variables including: IT insourcing and skills available in LBC. This will be started within this phase/scope of work but not completed as it will need to be kept live and continually adapted and updated throughout the duration of the whole programme.
* System requirements based on user needs and potential procurement activities.

**Out of Scope**

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| **Service Areas Out of Scope** | **Activities/Deliverables Out of Scope** |
| * MASH
 | * Recommendations on specific new technologies
* Data Strategy
* Business Case
* Implementation of the TOM
* Detailed task breakdown of all FTE involved in customer contact
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| **What happens at the end of this phase of work?**  |
| * By the end of April, LBC will have an as-is model of customer access points, customer demand and resident feedback, this will include recommendations for improvements and consolidation based on the design principles.
* A TOM will have been designed for customer access which will tackle the areas for improvement identified.
* A decision will be made by the sponsor around whether to proceed to implementation based on the TOM and initial roadmap.
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| **Project Type and Estimated Time/high level plan**  |
| Project Type:AgileMethodology: Adapted PRINCE2

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| **Initiation Stage - February 2024** * Confirm governance arrangements.
* Agree scope, lines of enquiry and deliverables for inclusion in this Project Brief.
* Confirm risks, assumptions, issues and dependencies.
* Set up all relevant meetings including draft ToRs.
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|  **Deliverables and Activities – March 2024*** Analysis of the as-is state across the contact centre and BTS.
* Analysis of existing internal data including call volumes, email, website and web forms data.
* Map structures and processes within the contact centres and evaluate costs.
* Conduct focus groups and workshops with internal staff and members.
* Conduct focus groups and interviews with residents.
* Produce a current state of demand and access points.
* Produce a set of personas and customer journeys representing the current state.
* A diagnostic report detailing the current state of demand and access to customer services and BTS.
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| **Deliverables and Activities – April 2024*** Use the as-is analysis as a basis to co-produce a ‘to-be’ experience for residents. Develop a target operating model that meets the needs of residents and staff, mapping what good quality service looks like and understanding the capability required to meet and measure quality standards.
* Produce a set of performance measures and principles to guide a future model of customer access.
* Map requirements/capabilities for CRM based on user needs.
* Map where processes should be eliminated, automated, assisted or holistic based on personas and user needs analysis.
* Map savings potential for new target operating model – through the identification of top 10/15 automation opportunities.
* Create recommendations for new ways of working, including skills, culture and governance to deliver the principles set out in the new TOM.
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| **END initial Discovery Phase/Decision Point - 26th April 2024** |

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| **Critical dependencies, constraints, assumptions**  |
| **Dependencies:** * Insourcing of Technology services from Capita and any requirements detailed being aligned to the capabilities of the new team.

**Constraints**: * The data available and the quality of data we can collect.
* Existing contracts and tech solutions.
* Need to create a model that has a fallback BCP.
* We can highlight issues with data quality and make recommendations, but we cannot necessarily solve within the time constraints of this project.

**Assumptions:** * Asset Map will form part of phase 3, helping to build technical requirements.
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| **Key Risks and Dis-benefits** |
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| Risk | Likelihood (1-5) | Impact (1-5) |
| Due to: Quality of data There is a Risk: That we will not be able to fully map the as-is model for customer experience.The Impact: Inability to measure customer experience effectively and design the TOM.  | 2 | 3 |
| Due to: The high level of engagement required for this work, in the time we have.There is a Risk: That officers won’t have time to engage.The Impact: We won’t be able to access the data we need. | 3 | 5 |
| Due to: Other workstreams happening at the same time. There is a Risk: Of dual effort and multiple asks of officers at the same time. The Impact: Officers won’t want to/won’t be able to engage at the level we need, and we won’t get access to required data. | 1 | 3 |
| Due to: Interdependent projects happening separately to us.There is a Risk: That we work in a siloed way. The Impact: Conflicting changes may arise across the org. | 1 | 3 |
| Due to: Short project length.There is a Risk: That there is not enough time to do effective research with end users.The Impact: The solution will not be based on optimal data.  | 2 | 2 |

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| **Project Benefits** |
| Benefits achievable within the scope of this project:

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| **Benefit** | **Description** | **Outcomes** | **Attribution** | **Measurement**  |
| Understanding current customer experience | Enhanced understanding of the E2E customer experience | LBC will have a detailed understanding of where customers are accessing, volume of contacts, customer experience and satisfaction, why customers are contacting and the levels of failure demand | Fully | Key measures of demand, causes, failure demand, cost to serve, satisfaction |
| Technical requirements | Enhanced understanding of the technical requirements and capabilities needed to deliver future TOM  | LBC will have an understanding of staff and customer user needs and opportunities for CRM, online automation and telephone in order to guide a future options appraisal | Partly | Increased LBC staff satisfaction with understanding of technical requirements for CRM, telephony and online automation |
| Future TOM defined | A TOM for customer access across all channels has been defined. | LBC staff will understand what success looks like for a target operating model and the impacts the new TOM are likely to have on customer experience, failure demand, resolution outcomes and efficiency/costs | Fully | Expected impact on key measures re: demand, channel usage, resolution and costs |

Benefits to be realised after the implementation of the recommendations:

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| **Benefit** | **Description** | **Outcomes** | **Attribution** | **Measurement** |
| Improved access channels for residents | Ensure the right channel for every resident. | More residents will be able to access council services via an efficient and effective channel that is appropriate to their needs. | Partly | Increase in percentage of first contact resolutionIncrease in online/self- service resolution/ reduction in transactional demand telephony and F2F volumesIncrease in positive feedback from customers, e.g., from surveys |
| Reduce failure demand  | Residents will only need to contact us when they need to (value contact) | Less call volumes due to demand failure, staff time is used to support those with more complex needs and improved resident satisfaction. | Partly | Decrease in percentage of calls due to demand failure.Increase in percentage of first call resolution. |
| Improved resident experience | Improve resident experience at point-of-access to council services and reduce the number of complaints and failure demand. | Residents can access information, advice and services before they reach crisis point. | Partly | Increase in positive feedback from customers, e.g., from customer surveysReduction in the volume of complaints |
| Improved data quality and visibility. | Easy to see and manage data regarding the residents and their satisfaction with the services they receive.Contact data is used to drive end to end service improvement and process redesign. | Officers are provided with the information that they need to understand the quality of customer services and the nature of customer contact.Staff are able to easily access information on resident at the point of need, to understand where the resident has accessed council services across different departments. Time is saved and less likelihood of mistakes and discrepancies between departments. | Partly | Percentage of data that is free from errors, omissions and inaccuracies.Percentage of require data fields that are populated.Feedback from officers on how easily they can access the data they need.  |
| Streamlined processes | Easy to see information about residents, eliminate rekeying and duplication, clear processes that build certainty and understanding of end to end process | Officers can provide a higher standard of customer service and have the tools they need to deliver a good experience. Residents are clear about what they can expect and whats expected of them | Partly. | increase in full resolution at first contact, increased take-up of online solutions, reduction in follow-up contacts. Increase in staff satisfaction with processes, as evidenced by internal staff surveys. |
| Improved staff productivity | Eliminate wasteful workarounds and rekeying of information. Reduce officer time on non-productive activities. | Officers can provide a higher standard of customer service and staff time is used more efficiently. | Partly | Increase in staff satisfaction with processes, as evidenced by internal staff surveys. |

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| **Project Stakeholders and Resource** |
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| Person or team | Responsible | Accountable | Consulted | Informed |
| Project Sponsor: Kate Robertson |  | X |  |  |
| Project Board  |  | X |  |  |
| Project Lead: Kelly PageProject Manager: Eve Seymour | X |  |  |  |
| Subject Matter Expert: Elrica Degirmen | X |  |  |  |
| Project Team: Youngin Park | X |  |  |  |
| Nikki Middleton  |  |  | X | X |
| Richard Pacheco |  |  | X | X |
| Murray James  |  |  | X | X |
| Sarah Markham (housing- homelessness partnership network) |  |  | X | X |
| DMT (active involvement) |  |  | X | X |
| Councillors  |  |  | X | X |
| Residents  |  |  | X |  |
| Homelessness – Colin Moone & Nazakat Ali |  |  | X |  |
| Housing (already housed) |  |  | X |  |
| Parking & Licensing  |  |  | X |  |
| CVS Beds https://www.cvsbeds.org.uk/about/ |  |  | X |  |
| Street Services (Vicky Hawkes) |  |  | X |  |
| Creditors and Debtors (Atika Chowdhury- could collect to ops) |  |  | X |  |
| Advice Partners Luton Irish Forum (Noelette Hanley- noelette@lutonirishforum.org), Luton Rights (Rumi Choudry) and Luton Law Centre (Pauline Gilson pgilson@lutonlawcentre.org.uk). Luton Citizens Advice stephanie.simeon@lutoncab.org.uk |  |  | X |  |
| SIVICA IT provider |  |  | X |  |
| BTS (Tim Keogh) |  |  | X |  |
| Faith groups  |  |  | X |  |
| Tenant participation board  |  |  | X |  |
| Disability resource centre  |  |  | X |  |
| Citizen's advice  |  |  | X |  |
| BLM Community Forum  |  |  | X |  |
| Luton Rising  |  |  | X |  |
| Age Concern (Colette McKeaveney <colettemckeaveney@ageconcernluton.org.uk) |  |  | X |  |

Resource: Council Departments that will need to be involved in the Project (this can be used to create a resource heat map across projects to ensure work is scheduled to avoid overly burdening departments across projects)

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|  | Is this department involved? Yes/No | Low, medium or high involvement? |
| HR | No |  |
| Legal | No  |  |
| Finance | No |  |
| Place | Yes | Medium |
| Highways | Yes  | Medium |
| Education | Yes | Medium |
| Waste and Recycling | Yes  | Medium |
| Social Care | Yes  | Medium |
| Amenity Management and tree work | Yes  | Medium  |
| Local Authorities and Social Housing Landlords | Yes | Medium  |
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| **Project involves processing of personal data?** |
| Human Engine is in contract with Luton Borough Council and is under contract to share sensitive data, where needed. Human Engine will be the Data Processor under the following principles:* Subject matter of the processing – Personal data relating to staff and service users; subject matter is a wide variety and could include special category data such as health and disability.
* Types of Personal Data – wide variety and could include special category data such as health and disability.
* Categories of data subject – Staff, members of the public and businesses.
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| **Project Sponsor’s Signature**  |
| **Signature:****Name:****Job Title:****Date:** |