

APPENDIX 1

“Easyaccess” – Time Line

1998 – Comprehensive Spending Review

The time line for Easyaccess started in July 1998 with the Comprehensive Spending Review for 1999-2002 in which additional money was allocated for modernisation in return for public sector reforms and from which £4.1bn was given to Scotland to invest in modern services.

1999 – Modernising Government White Paper

The Government published its flagship Modernising Government White Paper in March 1999 setting out its high level vision and aims for modern services. This paper had “Information Age Government” as one of the six key priorities of its programme of reform articulating the clear need to bring about a fundamental change in the way that ICT was used by government. Information Age Government was about joined up government to meet the needs of citizens, electronic service delivery to provide new, efficient and convenient ways for citizens to communicate with and receive services from government and the need for an ICT strategy for government to pool its knowledge and resources in tackling major national issues like smart cards, web sites and call centres.

2000 – Modernising Government Fund (MGF 1)

The Scottish Executive responded to the White Paper by establishing a dedicated 21st Century Government Unit to tackle the key ICT issues and immediately sought 21st Century Government Action Plans from all public sector organisations in line with this paper. In April 2000 the Scottish Executive also established a £25m invest-to-save Modernising Government Fund (MGF) and invited bids from the public sector for innovative projects relating to customer focussed service delivery using the latest modern technologies. The bidding guidance for the fund stated that priority would be given to projects leading to new forms of service delivery underpinned by ICT in the areas of education and health.

Moray Council successfully bid to this fund in May 2000 for a project called ‘Open Door’ to join up with Health in the area of single shared assessments and in December 2000 was awarded £585,000 of 25% matched funding to cover two years 2001-2003. The objective of the Open Door project was to implement a customer relationship management (CRM) system to provide a consistent single point of access to a range of health and social care information and services. The Scottish Executive initially classified Open Door as an eCare project along with a number of other projects in Scotland that were similarly proposing some form of joint working between Councils and Health Services.

2001- Open Door

An Open Door project board was established in 2001, chaired by the Director of Community Services the main sponsoring department and included representatives from Health and other Council departments, like ICT, Legal, Finance and Libraries. MGF funding was used to fund two dedicated posts for two years, namely, an ICT project Leader to lead on the technical issues and a Project Liaison Officer to lead on the business issues of the project. A presentation was given to CMT on 18 April 2001 when the project was formally kicked off with the approval of a Project Initiation Document (PID).

A CRM system was subsequently purchased from Siebel Systems, the market leader of these systems, following a site visit to Leeds City Council who were using it successfully in a contact centre for Housing and Social Services.

2002 - Auchernack

The Open Door project enabled the Council to carry out a proof of concept trial of a one-stop-shop approach to delivering consistent and quality customer service using CRM technology and this led to the creation of a new type of access point, or contact centre, in Auchernack House in Forres in August 2002. Two temporary contact officer posts were also recruited using the fund and they took ownership of all enquiries to the Forres office, using the CRM technology to log, follow up and monitor all customer contact. A number of key lessons were learned about the use of CRM technology and contact centres in general as well as identifying of a number of significant obstacles to joint working with Health especially in the area of data sharing that required action by the Scottish Executive at a national level.

MGF 1 funding helped the Moray Council to begin the technical work to building a customer service delivery infrastructure for the future but it was recognised that a lot of work remained in documenting and preparing the business processes within the service departments to make effective use of this technology.

At the end of the project, the Moray Council's work with Health was recognised by the Scottish Executive in its final MGF 1 report for pioneering the adoption of CRM technology and sharing our experiences and lessons learned with other local authorities in Scotland. The Open Door project was also showcased at national events in Glasgow and Paisley which were attended by the Minister responsible for local government.

In summing up the MGF 1 programme across Scotland, the Scottish Executive stated in its final report that :

“The concept of a purpose built Contact Centre is a relatively new concept for local authorities and represents a transition from the traditional telephone access. This new Contact Centre technology, along with telephone management system for reporting, means that specialised staff now deal with enquiries such as Council Tax, benefits, housing estates and tenancy,

planning and building control general enquiries, pest control, dog warden, blue badges, special uplifts, online booking civic suites, education bursaries and disclosures forms, education recruitment and all general enquiries. The newly trained Customer Service staff have access via the CRM model to the major back office computer system such as Council Tax, Planning, Social Work, and Housing Management.”

“A major benefit of the common CRM model across all of the multiple access channels has been in the improvement and development of staff themselves, enabling them to deal more satisfactorily with the everyday customer enquiries that they receive. More enquiries are dealt with at first point of contact and the Customer Service staff have delegated authority to undertake tasks previously dealt with in the back-office. For example being able to deal with multiple transactions or enquiries in one call, and providing a better means of contact for isolated customers. Moreover because there is a common infrastructure to support the multiple channels the trained Customer Services staff, working from a common web based information system, can rotate between the different roles, i.e. they can enjoy a variety of work between the One-Stop Shop, the Contact Centre, or to follow up online enquires.”

And finally :

“In North Lanarkshire, for example, it is estimated that the introduction of the CRM system will reduce the time that staff spent on administration by approximately a third, which will mean that Customer Service staff will be able to spend more time handling customer enquiries.”

2003 – MGF 2 and ‘A Customer in Focus’

The Scottish Executive announced a further round of funding (MGF 2) late in 2002 to build on the successful projects that emerged from MGF 1, like Open Door. The guidance for this round of funding was more prescriptive than previously as it was informed by the experiences and lessons learned from these early pathfinder projects. This guidance identified four key project areas all of which were to be underpinned by CRM and electronic service delivery, namely :

- Citizen Account and smartcards
- Data Sharing
- Data Standards
- E-Procurement

The Moray Council again successfully bid to this fund in order to carry on with the work started with the Open Door project by further developing the Auchernack model to create a corporate model that could be rolled out across Moray. The bid allowed the Council to continue the work of building the technical infrastructure required to deliver customer service across different access channels but crucially to begin the development of a business process infrastructure required to redesign services around the changing needs of the citizen. The bidding process was lengthy as the Scottish Executive sought to

join up similar bids in the interests of efficiency especially around projects involving CRM of which there were now many. The Scottish Executive finally announced its funding for the CRM based projects, including Moray, on 17 December 2002 subject to all those Councils joining a consortium made up of 21 Councils. An overarching programme for the consortium was then established called "The Customer in Focus – A Programme for Scotland" which set out the national objectives and targets for contact and call centres, transactional self-service web sites and customer service centres.

The Moray Council was awarded £761,719 of 25% matched funding for a further two years, 2003-5, made up as follows :

Project	Award
EasyAccess (Open Door Replacement)	£550,000
Establish Master Address Database (DNAS)	£60,000
On-Line Planning (e-Planning)	£30,000
Dialogue Youth	£121,719
Total	£761,719

A PID for the Easyaccess element of the programme was produced in July 2003 and a presentation was given to all senior managers of the Council in November 2003. The MGF 2 funding was used to recruit a team of 13 temporary members of staff covering ICT and the business for a further two years to carry out the programme, to purchase call centre technology to integrate the CRM system with the phone system and a on-line electronic forms system for use with the Council web site and, finally, to employ specialist contractors to carry out process mapping.

Process mapping helped to identify a number of generic customer facing processes that were common to most, if not all, services and importantly the position of the front-office back-office split for each service. This helped to prove the concept that it was feasible to bring together all customer facing processes into a single unit, the front office, to deliver efficiency savings and service improvements to the public.

One of the initial objectives of the Easyaccess project was to roll-out the Auchernack contact centre model to the other access points and outline plans and costings were drawn up to significantly redevelop the access points in Elgin, Buckie and Keith, although no MGF funding was available for this as it did not qualify for Scottish Executive support. The original aim had been to transform these access points into one-stop-shop contact centres handling all customer contact across all access channels, including face to face and telephone.

However, this changed in the light of further experience gained from the Auchernack contact centre which showed that face to face and telephone contact should be kept separate and a need to improve telephone call answering rates across the Council which was found to be averaging 17% or 200,000 per annum. A decision was therefore taken to concentrate on telephone contact and to establish a telephone call centre in the first instance. This was supported by studies that showed that telephone contact was the preferred access method for the public - 75% of all access – and that this

would continue to be the case for the foreseeable future. This change in direction of the project was also in line with the national CRM programme to which other Scottish local authorities had come to the same conclusion.

Another key lesson learned by the project which was also in line with the national programme was the need to grow and promote electronic service delivery as this had the potential to divert resources to those customers whose needs are more complex and are best met by a greater level of face-to-face contact.

2004 - MGF 3 and 'Customer First'

The Scottish Executive started to consult with local authority chief executives on a further round of funding (MGF 3) in early 2004 to build on the excellent work that was being done by local authorities and especially the CRM consortium. This consultation identified a core problem that each local authority was trying to solve, namely :

- A number of callers did not get their call answered, perhaps 20%
- Often, even when the call is answered, the customer is referred somewhere else, up to 25%
- Often, even after the referral process, the customer's service request may not be dealt with, up to 25%
- All the above involved the customer repeating their details and request a number of times

The outcome of this consultation was to set up a single overarching programme for the whole public sector called 'Customer First' which had a clearly defined set of national objectives and targets for customer contact and satisfaction. These national objectives and targets were to be monitored by the Scottish Executive as part of its benefits realisation framework.

The Scottish Executive invited bids for MGF 3 in May 2004 and the Moray Council submitted another bid to continue the work started under MGF 2 and the Easyaccess project.

Meanwhile, the Customer First programme was presented to and endorsed by all the Scottish Chief Executives at their meeting of 27 August 2004 and was officially launched by Tom McCabe, the Minister for Finance and Public Sector Reform on 28 October 2004 in Hamilton when he confirmed the Scottish Parliament's commitment to :

- Citizen focussed services underpinned by technology and delivered by multi-skilled well trained staff
- Freeing staff from mundane processes to engage with the public
- Reduced transaction times, costs and waiting times
- Innovative use of IT to improve effectiveness of services

The Minister also endorsed the aims and objectives of the Customer First programme by stating that it was principally about outcomes to the public, namely :

- Calls dealt with at first point of contact
- Calls answered first time
- Calls dealt with by one person
- Calls dealt with by one process

2005 - Easyaccess (Phase 2)

The Scottish Executive announced the result of the MGF 3 bidding process on 1 February 2005 when the Moray Council was awarded £865,750 of 25% matched funding to continue with the second phase of the Easyaccess project, Moray's response to the Customer First programme. A breakdown of this funding is shown in the table below.

Resource	Description	Amount
Staffing	A dedicated team to develop and implement the project (Easyaccess, Dialogue Youth and DNAS).	£695,000
Smart Cards	Concessionary fares scheme/Dialogue Youth	£102,000
Equipment	Essential ICT equipment required to support the Citizen Account.	£60,000
Miscellaneous	Other miscellaneous items yet to be specified.	£8,750
MGF Total		£865,750
Council Contribution	Other equipment and services required to support the project. Accommodation costs including refurbishment of access points.	£288,583
Project Total		£1,154,333

A PID for the second phase of Easyaccess was published in May 2005, with its overall aim to comply with the overall requirements of Customer First, a condition of MGF 3 funding, but more specifically to move services from the back-office to a single point of contact front-office environment and to train front-office staff to deal with a wide range of customer enquiries. Furthermore, the PID identified a 'Top 20' of high volume services that would transfer in the first instance. These closely matched the services that were being transferred by other local authorities and were the same ones identified by the Scottish Executive and Socitm as the most suitable.

The Easyaccess project made good progress during this phase and a Revenues call centre was finally established on 25 September 2006 for Council Tax and Benefits services. The call centre was not a corporate call centre at this stage as it was staffed and managed by the Revenues Section, who had undergone a restructuring of its service incorporating a front-office back-office split to separate telephone handling from processing. The call centre allowed the Revenues Section to centralise and streamline its

telephone call handling including calls from the area offices with statistics showing that the number of unanswered phone calls has been substantially reduced from around 40% previously to 8%. The call centre technology has continued to perform well and the staff have adapted extremely well and continue to be highly motivated.

The original Top 20 services were reviewed during the second half of 2006 and a revised list of 29 services was identified by the Easyaccess project board as potentially feasible for transfer to the call centre. A programme of data collection and analysis for the 29 services was started in order to gather the information required to configure the call centre system with the necessary scripts for each service activity.

Five quick wins were identified from the list of 29 services for early implementation and plans were developed for their implementation in consultation with the service departments concerned. The five quick wins were :

- Applying for a Job
- Requesting a Special Uplift
- Requesting Pest Control/Dog Warden
- Reporting an Abandoned Vehicle
- Making a general refuse or recycling enquiry

A further additional quick win was identified as a result of the need to establish local arrangements for administering national entitlement cards used by the elderly, disabled and young people for concessionary travel. This local arrangement is required to be in place by October 2007 and will be delivered from the call centre working closely with access points and libraries.

Substantial progress has also been made in developing the self-service aspect of the Council's web site allowing the public to transact with the Council by means of interactive on-line application forms. This is leading to significant efficiency savings and is freeing up value staff time to deal with the more complex service requests.