Tamworth
Borough Council

POST PROJECT REVIEW

My Tamworth Customer Portal

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Contents

Post Project Review

1) Project Summary

The project implementation review relates to the delivery of the My Tamworth Customer Portal and the Digital 360 Customer Relationship Management (CRM) system.

The contracting authority for this project is Tamworth Borough Council and the provider is Civica.

The key purpose of the project is to enhance access to services by creation of the My Tamworth Customer Portal, available to all residents within the Borough. The portal offers efficiency savings in resources and process and allows service requests to be submitted 24hrs a day, 365 days per year. The customer portal does not replace the council's website, it works seamlessly with it; the website provides the static content, directing customers to the online portal when customers want to transact with the council.

The Digital 360 CRM is designed to create a 'golden customer record' across all back office systems to create a seamless customer experience. Monitoring portal interactions can also provide data analytics that can help shape future service delivery, by providing intelligence on customer needs and demands and to offer opportunity to develop tailored services for vulnerable groups.

The end to end process was managed as a corporate project and involved several service areas, with monthly highlight reports being provided to the Executive Leadership Team who approved a new project schedule in October 2021. This schedule accounted for issues arising in the latter stages of the project and to enable a launch of a live facility, the project schedule was designed into two phases:

1	Make a complaint,
	Report an issue such as a short fall in service delivery
	View Council Tax balance and latest statement
	Service requests for Green & Clean Teams (including litter, broken glass and graffiti)
2	My Requests Tracker,
	Add or remove Single Person Discount,
	Make a payment - to initially include council tax instalments and then to be developed for any payments for council services…

2) Project Team Staffing

Zoe Wolicki – Assistant Director (People)

Ali Millard – Head of Customer Experience

Gareth Youlden – Head of Technology & Information Services

Mike Buckland – Head of Revenues

Chris Roe – Benefits Manager

Lisa Dearne – Senior Revenues & Benefits Officer

Jon McDevitt – Knowledge, Performance & Insight Manager

Joanne Shaw - Customer Services Manager (Digital)

Karen Cousins - Senior Customer Service Officer (Digital)

Kirsty Horsnell – Customer Service Officer (Digital)

Angela Baker – Senior Customer Services Officer (Operations)

Jane Wells – ICT Systems Support Officer

Rob Vernon – Business Systems Analyst

Irvine Lewis – Business Systems Analyst

Ian Filmer – Revenues Systems Officer

Faron Blencoe - Senior Revenues Recovery Officer

Masoom Rahman – Business Systems Analyst

Nicola Hesketh – Information & Governance Officer

External Provider – Civica

3) Post Implementation Review Team Staffing

Zoe Wolicki – Assistant Director (People)

Ali Millard – Head of Customer Experience

Gareth Youlden – Head of Technology & Information Services

Joanne Shaw - Customer Services Manager (Digital

Karen Cousins - Senior Customer Services Officer (Digital)

Masoom Rahman - Business Systems Analyst

4) Project Scope

The agreed project scope provided for:

Civica Portal Package Solution including Corporate Customer Portal Corporate CRM (Customer Relationship Management) (Duration 40 days)

5) Project Costs (Quoted by Civica)

Description	Volume	Price Each	Total
Corporate Civica Portal & CRM Software Licence and Services Pack Description - Civica Portal Package Solution including Corporate Customer Portal 360 Corporate CRM. Fixed price services pack implementing portal and CRM for Housing Benefits and Housing Processes and providing Tamworth with the knowledge and capability to become self-sufficient for future implementation	1	£90,000	£90,000
Civica Portal Package & CRM Package Annual Support and Maintenance Annual Charge	1	£18,000	£18,000
Total			**£108,000**

6) Project Deliverables – Planned vs Actual

Planned Activity	Actual Activity	Comments
Deliver fixed price services pack, implementing Portal and CRM for Council Tax, Housing Benefits and Housing Processes To include: - Housing Application Form - Safeguarding Reporting - Moving Home Notifications - Single Person Discount - Payments Facility	Civica grossly underestimated the intricacy of some of our processes and therefore to enable progression of creating a self-service platform, negotiations had to be undertaken to revise the scope of works. Civica were unable to commit to creating a Housing Application e-Form (this was later developed and launched via Orchard) and it was negotiated that the complaints process would be delivered in lieu of this. Civica were also unable to deliver a safeguarding process due to lack of integration/ technology they advised they were willing to develop the process at a cost of circa £12k. We rejected this and proceeded	The contract terms agreed were that software was invoiced on order so by the time problems in delivery were identified, Tamworth Borough Council had paid for the portal and CRM product and therefore remained invested in seeking solutions to make progress in meeting customer appetite for online services. Several contract meetings were held to negotiate terms with Civica and align their activity to the requirements agreed within the contract but it became clear their quotation rationale was greatly flawed. As the project duration was extended considerably, several unforeseen challenges were experienced:

	to create our own process which was an online form routed from our website to the relevant agencies for priority action to report concerns from professionals and/or the general public. The Civica consultancy hours included in the quotation were grossly understated and absorbed in the remaining processes. As the TBC team knowledge developed, new processes and journey maps were created by our in house team to include the generic 'Report It' form which can be further developed for other service requests across multiple local authority functions such as license applications	- change of project delivery manager within Civica (x2) - account manager who provided quotation left Civica - change of project lead at TBC (x3) - trainer left Civica (x1) - death of a key Project Officer at TBC - software upgrades (x 5 plus 1 pending)
Providing Tamworth Borough Councils employees with the knowledge and capability to become self-sufficient for future implementation	Many workshops and extensive one to one virtual sessions were conducted to train our digital team in building processes, journey mapping and reporting. As Civica worked on delivering the processes remaining in the revised project scope, our digital team continued to apply their knowledge to develop portal processes to assist other areas of the business such as a generic 'Report It' form and streamlining the taxi license application process which was developed to support continued service delivery whilst covid restrictions were in place.	When calculating their quotation, Civica grossly over estimated our in house resource and specialist knowledge which is required to build and implement portal processes in the system. Civica also underestimated the intricacy of some of our processes and they were required to resource building and journey mapping. To claw back time in the project schedule, Civica offered 'workarounds' which the TBC Project Team rejected as inefficient and detrimental to a positive customer experience. This in turn led to delaying the launch as we were unwilling to compromise quality over timescales. Civica originally committed 40 days to deliver the portal product. To date, we are at over 200 days to launch Phase 1. Civca are absorbing these

		costs as the contract was to deliver the products within the 40 allocated days.

7) Project Costs

To Date (Actual)

Customer Portal Software	£ 50,000.00
Consultancy to Implement Portal & CRM	£ 26,150.00
Record De-Duplication Activity	£ 4,110.00
Application Processing Interfaces (APIs)	£ 20,552.50
Total	**£ 100,782.50**
Residual Budget	**£7,217.50**

8) Transition to Operations

High volume, low value tasks have been prioritised for portal development to include council tax account balance enquiries, customers registering their move to a new property and application for single person discount – previously protracted processes for us and the customer.

Knowledge transfer has been successful and we have self-sufficiency to build many of our own processes and journey maps; there is currently a residual budget of £8,000 available to develop processes which are highly complex. We will now focus on building resilience within the digital team through individual training and development plans.

We will continue to work across the organisation to demonstrate the portal and discuss opportunities for including more processes on the system. This is being trialled with the Housing Solutions team by streamlining the housing application back office process and using the portal to support the customer experience. We plan to use the outcome of this collaborative working example as best practice to promote the benefits of the portal to other departments.

9) Residual Risks

- Change in personnel/ project management – *mitigated through training and development plans*

- Availability of key personnel for testing/ upgrades – *mitigated through agreeing work schedules and target dates*

10) User Satisfaction

We remain committed to fostering a positive customer experience with efficient and transparent back office processes that enable higher officer productivity.

We will continue to monitor and report on outcomes of the portal by gathering service user and staff feedback.

11) Lessons Learned
Throughout the project the team have regularly reviewed and documented risks and issues and have reflected on the approach taken and have identified where improvements to processes or plan

a) This project has been a great example of cross-departmental collaboration to deliver such a complex project. Staff from 6 departments have worked together and developed their skills and knowledge together and have produced a great result.
b) Whilst the TBC project team were clear on the outputs required Civica made a number of assumptions when developing their quotation and contract. The assumptions were:
   - TBC staff were more experienced and knowledgeable with the creation of process building within the system. This meant that a huge amount of training was required for our staff none of which was factor in the tender
   - That the processes TBC required to be put onto the portal were non complex. TBC always described the nature and complexity of the processes Civica seemed to initially believe that they were simple and subsequently discovered that the core system would not support this approach.
   Both of these assumptions led to the number of consultancy days being increase vastly. To prevent this situation occurring in future projects it is recommended that a more thorough check of the understanding of project deliverables is undertaken
c) Some of the delays in progressing with the project have been down to availability of TBC staffing resource for testing the newly developed processes or for system upgrades. This was due to the councils work to deliver grants and benefits to Tamworth residents throughout the pandemic. It is recommended for future projects that dedicated resource is identified at the beginning of the project and that this resource's first priority is project work.
d) Staffing resource from Civica was very inconsistent with multiple personnel changes which resulted in delays due to new resources familiarisation with the project. Further some resources allocated to the TBC project did not have the skill or knowledge to carry out some of the work required which meant further delays as Civica developers were required to support however they were engaged in other projects so this took time. This aspect is difficult to mitigate entirely for the future as it is out of TBC's control but the awareness of this issue will be useful for future project planning.
e) By observing team dynamics as the project has progressed we have identified some key strengths and abilities within team members who have become subject experts and will be able to support the organisation to deliver future projects.

12) Next Steps

For the past year, we have as a matter of routine directly contacted service leads and actively sought opportunities for developing portal and Digital 360 CRM processes. From these interactions, we have devised a Digital Development Plan that focuses on activities to remove waste in process and streamline the customer journey. This maximises our return on investment for this project by adding value to the wider organisation.

In addition, we are able to work with other stakeholders, such as voluntary agencies, to embed digital processes that ease their workload and provide swifter access to services for vulnerable client groups.

13) Recommendations

Performance and development of the portal and its processes should be continually reviewed and reported on at six monthly intervals.

The Digital Development Plan corporate project should identify and implement enhancements to self -service processes with progress being reported via the corporate project highlight reporting structure, to include how residual budget is utilised.

The impact of the My Tamworth customer portal should be monitored to ensure that vulnerable service users are able to easily access our services and will be reported on at 6 monthly intervals.

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