

# Service Improvement and Efficiency Committee

## Agenda

### Members of the Committee:

Cllr J L Thomas (Chairman)  
Cllr P E Bulman  
Cllr S J Catchpole  
Cllr S M Clancy  
Cllr S I Holland  
Cllr K S Kelly

Cllr G K Nurden (Vice Chairman)  
Cllr I J Mackie  
Cllr M L Murrell  
Cllr S M Prutton  
Cllr D Roper

Cllr J J Emsell (ex officio)

### Date:

Monday 17 October 2022 at 6pm

### Place:

Council Chamber, Thorpe Lodge, 1 Yarmouth Road, Thorpe St Andrew, Norwich

### Contact:

Dawn Matthews tel (01603) 430404 Email: [dawn.matthews@southnorfolkandbroadland.gov.uk](mailto:dawn.matthews@southnorfolkandbroadland.gov.uk)  
Website: [www.southnorfolkandbroadland.gov.uk](http://www.southnorfolkandbroadland.gov.uk)

### PUBLIC ATTENDANCE:

If a member of the public would like to attend to speak on an agenda item, please email your request to [committee.bdc@southnorfolkandbroadland.gov.uk](mailto:committee.bdc@southnorfolkandbroadland.gov.uk), no later than 5.00pm on Wednesday 12 October 2022.

## Large print version can be made available

If you have any special requirements in order to attend this meeting, please let us know in advance.

# AGENDA

1. **To receive declarations of interest under Procedural Rule no 8** (page 3)
2. **Apologies for absence**
3. **Minutes of the meeting held on 24 August 2022** (minutes attached – page 5)
4. **First Class Customer Service – Customer Experience Phase One**  
(report attached - page 12)
5. **Exclusion of the Press and Public**  
  
The Chairman will move that the press and public be excluded from the meeting for the remaining items of business because otherwise, information which is exempt information by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972, as amended by The Local Government (Access to Information) (Variation) Order 2006, would be disclosed to them.
6. **Licensing Service Review** (report attached - page 21)

## DECLARATIONS OF INTEREST AT MEETINGS

When declaring an interest at a meeting Members are asked to indicate whether their interest in the matter is pecuniary, or if the matter relates to, or affects a pecuniary interest they have, or if it is another type of interest. Members are required to identify the nature of the interest and the agenda item to which it relates. In the case of other interests, the member may speak and vote. If it is a pecuniary interest, the member must withdraw from the meeting when it is discussed. If it affects or relates to a pecuniary interest the member has, they have the right to make representations to the meeting as a member of the public but must then withdraw from the meeting. Members are also requested when appropriate to make any declarations under the Code of Practice on Planning and Judicial matters.

<p>Have you declared the interest in the register of interests as a pecuniary interest? If Yes, you will need to withdraw from the room when it is discussed.</p>
<p>Does the interest directly:</p> <ol style="list-style-type: none"> <li>1. affect yours, or your spouse / partner's financial position?</li> <li>2. relate to the determining of any approval, consent, licence, permission or registration in relation to you or your spouse / partner?</li> <li>3. Relate to a contract you, or your spouse / partner have with the Council</li> <li>4. Affect land you or your spouse / partner own</li> <li>5. Affect a company that you or your partner own, or have a shareholding in</li> </ol> <p>If the answer is "yes" to any of the above, it is likely to be pecuniary.</p> <p>Please refer to the guidance given on declaring pecuniary interests in the register of interest forms. If you have a pecuniary interest, you will need to inform the meeting and then withdraw from the room when it is discussed. If it has not been previously declared, you will also need to notify the Monitoring Officer within 28 days.</p>
<p>Does the interest indirectly affect or relate any pecuniary interest you have already declared, or an interest you have identified at 1-5 above?</p> <p>If yes, you need to inform the meeting. When it is discussed, you will have the right to make representations to the meeting as a member of the public, but you should not partake in general discussion or vote.</p>
<p>Is the interest not related to any of the above? If so, it is likely to be an other interest. You will need to declare the interest, but may participate in discussion and voting on the item.</p>
<p>Have you made any statements or undertaken any actions that would indicate that you have a closed mind on a matter under discussion? If so, you may be predetermined on the issue; you will need to inform the meeting, and when it is discussed, you will have the right to make representations to the meeting as a member of the public, but must then withdraw from the meeting.</p>

**FOR GUIDANCE REFER TO THE FLOWCHART OVERLEAF.  
PLEASE REFER ANY QUERIES TO THE MONITORING OFFICER IN THE FIRST  
INSTANCE**

## DECLARING INTERESTS FLOWCHART – QUESTIONS TO ASK YOURSELF



## **SERVICE IMPROVEMENT AND EFFICIENCY COMMITTEE**

**Minutes of a meeting of the Service Improvement and Efficiency Committee of Broadland District Council, held on Wednesday 24 August 2022 at 6pm at Thorpe Lodge, 1 Yarmouth Road, Thorpe St Andrew, Norwich.**

**Committee Members Present:** Councillors: J Thomas (Chairman), P Bulman, S Catchpole, S Clancy, S Holland, G Nurden, S Prutton, and D Roper

**Apologies for Absence:** Councillor: I Mackie

**Cabinet Members Present:** Councillors: J Emsell and S Vincent (for part of the meeting)

**Officers in Attendance:** The Managing Director, the Director of Resources, the Chief of Staff and Monitoring Officer, the Assistant Director – Finance, the Assistant Director ICT/Digital and Transformation, the Strategy and Intelligence Manager, the Transformation and Innovation Lead Officer and the Democratic Services Officer (DM).

**Others present:** The press (for part of the meeting)

### **1 DECLARATIONS OF INTEREST**

No declarations of interest were made.

### **2 APOLOGIES FOR ABSENCE**

An apology for absence was received from Cllr I Mackie.

### **3 MINUTES**

The minutes of the meeting held on 17 May 2022 were agreed as a correct record and signed by the Chairman.

In response to a question, the Portfolio Holder for Transformation and Organisational Development advised that the purchase of the Horizon building was progressing well and within the expected timeframe.

## **4 COLLABORATION WORKING GROUP**

The Chief of Staff and Monitoring Officer presented the covering report and explained that the Collaboration Working Group had been set up at the request of the Portfolio Holder for Transformation and Organisational Development to review collaboration and had agreed its terms of reference at its first meeting. The conclusions of the work undertaken by the Working Group were set out in the report of the Portfolio Holder for Transformation and Organisational Development. The areas of work covered by the Working Group had been: governance, external communications and public affairs, one team culture and employer of choice, finance and performance and customer engagement. A presentation on each topic area had been made at the first meeting, with the subsequent meetings being provided with a report on the topic area containing recommendations which were agreed by the Group. The report before the Committee was a summary of those already agreed recommendations. The Committee was now being invited to consider and endorse the Portfolio Holder's report.

The Leader of the Opposition raised concerns about the process for the preparation of the report. Membership of the Working Group was set out in its terms of reference but the report had been prepared by a member not on the working group. She stated that the report had not been seen by the members of the working group before publication with the agenda papers and that it was not a legitimate report. She suggested that the report be rejected as it was not a report of the Working Group and not in accordance with the terms of reference. When asked for examples of how the report did not accord with the terms of reference, the Leader of the Opposition commented that the author of the report was not a member of the Working Group and that the Working Group had conducted a review run by the Portfolio Holder; it was not a review in accordance with the feasibility study.

The Chairman pointed out that the Portfolio Holder's report had been available to members on sharepoint from 7 July 2022.

The Leader of the Opposition responded that the Working Group had been due to meet on 5 July to prepare its report on the evaluation and review of collaboration to present to the peer review team. The meeting had not taken place. The Portfolio Holder's report which had been available from 5 July was not something the Working Group had contributed to and she was of the view that the Group had been overruled.

The Chief of Staff advised the Committee that the report of the Portfolio Holder was a summary of all the reports which had been considered and agreed by the Working Group. The report had been circulated to all members of the Working Group with a view to it being discussed at the meeting scheduled for 5 July. Members had decided not to hold that meeting.

A comment was made that the terms of reference included the concept of culture and the member questioned the regard for culture in relation to the passage and progress of the report. The member stated that the report was essentially highlights from the minutes of the Working Group meetings and the member made reference to various stages leading to the preparation of the report, including it being examined by a group of conservative members only before being submitted to the Committee for consideration. It was not a report from a member of the Working Group but was being presented as such. The member claimed that the officer's covering report omitted to mention that the Working Group had not concluded its work, yet the findings were being presented as their conclusion and this fell below the standards the member would expect. The member made reference to a suggestion from the Chairman of the Working Group that a meeting be held with Leader and Deputy Leader to find a way forward and the member suggested that further consideration of this matter be deferred until such a meeting had taken place.

The Chief of Staff responded by reiterating that the Working Group had been set up in line with the constitution and had operated in accordance with the constitution.

The Chairman commented that she had reviewed all the minutes of the meetings of Working Group and these accorded with the content of the report. There was a reference to the need to still seek feedback on Planning from the Director of Place and she acknowledged that the final meeting had not been held at which the Working Group would have considered its final report. She did not believe, however, that there was anything fundamentally different in the report to what was reflected in the Working Group minutes. The Leader of the Opposition was of the view that there were recommendations in the report which she did not believe were included in the minutes of the Working Group meetings.

A member commented that it was clear that the report before the Committee had been compiled from the agreed recommendations of the Working Group. With regard to the timescales involved in the resignation of the Working Group and the compilation of the report, it was confirmed that the members had resigned after publication of the report.

The Chairman of the Working Group thanked members of the Working Group and officers for the time they had given to the Group and stated that a great deal of good work had been done. The Group had however not been able to conclude its work and had not been able to hold a final meeting to pull together a summary of its findings. The report before the Committee was not from the Working Group. He stated that there were a number of recommendation within the existing report which the Working Group would have endorsed but there were a few which it wanted to change which would have come forward at the final meeting. In answer to a question, he advised that he was not able to identify these items on the hoof. He commented that he was a supporter of collaboration and of the

opportunity to have a meaningful, comprehensive, cross party review of collaboration. Unfortunately this had not been concluded and the Working Group did not wish to be associated with the report. Another member suggested the work of the group had been tainted and concerns raised gave doubt as to the legitimacy of the report. There was a need to see the process properly completed and that a pragmatic approach should be taken to allow the work of the Group to be completed by delaying consideration of the report. They added that this would also enable the omitted Planning issues to be explored as this area was underperforming and it would be helpful to examine the impact of collaboration in this area.

The Chief of Staff expressed concern at the reference to the report being tainted and stated she believed the report accurately reflected the excellent work undertaken by the Working Group.

It was then proposed, duly seconded that discussion on the two reports be deferred and the Committee requests members of the Working Group meet and arrange a meeting with the Leader and Deputy Leader and report back to the Committee. On being put to the vote, with 4 members voting for, 2 against, and with 2 abstentions, the proposal was carried.

#### **AGREED**

that discussion on the two reports be deferred and the Committee requests members of the Working Group meet and arrange a meeting with the Leader and Deputy Leader and report back to the Committee.

## **5 USING INTELLIGENCE TO ACHIEVE A FIRST-CLASS CUSTOMER SERVICE**

The Assistant Director ICT/Digital and Transformation presented the report which set out how the Council proposed to use data and intelligence to drive delivery of the ambitions set out in the Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for communities and businesses. She drew attention to the three key recommendations in the report and went on to explain that business intelligence was about seeking to use data to make decisions now and to plan for future decision making rather than making reactive decisions. She made reference to the strategic plan priorities and how data intelligence could contribute to achieving these priorities. The availability of business intelligence would enable the Council to profile its customers and target efforts to predict and prevent issues and to enable early intervention based on data insight. An example given was homelessness needs and the ability to target the Council's approach to this area. It would aid decision making and performance reporting and facilitate more timely decisions.



The Assistant Director ICT/Digital and Transformation drew attention to the costs involved as set out in the report which were mainly for resources and consultancy with a smaller sum for technical products.

The Transformation and Innovation Lead Officer then took members through an example of the kind of data available for a snapshot of the telephony system. Data included number incoming calls, answered calls, missed calls, the date and time of calls and data regarding trends in calls received over periods of time. Through Microsoft teams, this information could be delivered to teams.

Members welcomed the proposals and reference was made to the recent improvements in the Council's response to phone calls. The Housing and Benefits team was also congratulated on its continued high performance. A comment was made that there was a need to continue to ensure that those who were not able to access council services online were still able to secure assistance when needed.

A question was raised regarding the legal and environmental implications of the proposals, and if the proposals would be compliant with GDPR and if information gathered could help inform the development of the environmental strategy.

The Assistant Director ICT/Digital and Transformation commented that the Council continued to recognise that not all residents had access to the internet and that the proposals would help to identify and better target these residents and take services to them. The team worked closely with the Governance team to ensure compliance with GDPR. Most of the data collected was not personal data.

With regard to a comment about the cost of the service and its impact on savings from collaboration, officers responded that the cost of commissioning 3<sup>rd</sup> parties to undertake the work would be significantly higher than the proposed service and it was possible that the opportunity to strip out inefficiencies and focus on high performance could result in a contribution to savings and the collaboration journey rather than an additional cost.

In response to a question regarding the 45/55 share applied across the two councils as part of collaboration, the Director of Resources commented that the arrangement was regularly reviewed and was still currently an appropriate split.

It was, on being put to the vote, with 7 members voting for, 1 abstention,

### **AGREED to recommend**

1. Cabinet to recommend to Council the agreement of funding to establish a Business Intelligence Service as set out in section 4.7 of the report.

2. Cabinet to recommend to Council that funding for 2022/23 is drawn from the corporate contingency.
3. Cabinet to recommend to Council that funding for the Business Intelligence Service is built into the base budget from 2023/24.

## **6 EXCLUSION OF THE PRESS AND PUBLIC**

### **RESOLVED:**

That the press and public be excluded from the meeting because otherwise, information which is exempt information by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972, as amended by The Local Government (Access to Information) (Variation) Order 2006, would be disclosed to them.

*[The press then left the meeting]*

## **7 OPTIONS ON PROVISION OF A FUTURE FRAUD SERVICE**

The Assistant Director Finance introduced the exempt report which provided options on the future resourcing and delivery of a fraud service for Broadland District Council and South Norfolk Council. He went on to explain that, in the interests of expediency, the report was being considered by this Committee rather than the Audit Committee which would have considered such matters but that the Audit Committee members had been updated on the proposals.

Members expressed their support for the proposals commenting on the importance of work to prevent and detect fraud across all services. They noted that, if the proposals were supported, the Fraud and Corruption Strategy would need to be updated and the Assistant Director Finance commented that this would be done. A suggestion was put forward and agreed that, as part of negotiations for the contract, a requirement for performance data be included.

### **AGREED to recommend that:**

Cabinet agrees to the fraud function being delivered in conjunction with Anglia Revenues Partnership, via a S113 agreement with Breckland District Council.

(The meeting concluded at 7.15pm)

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Chairman

**Agenda Item: 4**  
**Service Improvement and Efficiency Committee**  
**17 October 2022**

**First Class Customer Service – Customer Experience Phase One**

**Report Author(s):** Corinne Lawrie  
AD ICT/Digital and Transformation  
Corinne.lawrie@southnorfolkandbroadland.gov.uk

**Portfolio:** Transformation and Organisational Development

**Ward(s) Affected:** All

**Purpose of the Report:**

This outline business case provides a proposal for initiating a Discovery exercise to identify and map out the current end-to-end Customer Journeys and the associated Customer Experience at each touchpoint and interaction with the two Councils.

**Recommendations:**

1. To agree to initiate the discovery phase as the first phase towards establishing the current state, the future state and the underpinning technology to inform a fully-costed business case for investment to deliver a First-Class Customer Service.
2. To utilise the £110,000 from Earmarked Reserves agreed by Cabinet on 8<sup>th</sup> February 2022 with Broadland District Council's contribution of £49,500 to be used on consultancy resource to support in the development of a full outline business case.

**1. Summary**

- 1.1 The purpose of this report is to outline the need to seek consultancy support to further explore the One Team vision for delivering first-class customer experience from a people, process and technology perspective.

- 1.2 To seek Cabinet approval to initiate the discovery phase to accurately inform what first-class customer service means for the One Team and to deliver a fully costed business case for the technology solution(s) that underpins the vision for first-class customer service.

## 2. Background

- 2.1 South Norfolk Council and Broadland District Council's Strategic Plan 2020 – 2024, set out its vision to; *“work together to create the best place for everyone, now and for future generations”*. A key element of achieving this vision is the commitment to *“putting the customer at the heart of everything we do.”*
- 2.2 The ICT and Digital Strategy set out the need to improve and transform our service offering through the innovative use of technology. With a focus on first class customer service and a reduction in the cost of end-to-end service delivery, whilst enabling customers to interact with us in a modern and efficient way.
- 2.3 To achieve a first-class customer service the following strategic guiding principles have been highlighted:
- **Principle 1 - Right First Time:** Reduce cost and failure demand by getting it right first time, minimising repeat contact and keeping the customer informed.
  - **Principle 2 - Every Contact Counts:** Making connections based on customer data and joining up our service offering to benefit the customer.
  - **Principle 3 – Delivering an Excellent Customer Service:** Customers can access our services at a time that suits them, using their channel of choice and receive a consistent customer experience.
  - **Principle 4 – Grow a ‘Customer-first’ Culture:** Invest time in understanding customer needs and customer demand. Learning from customer feedback and insight to target services to those that most need them.
  - **Principle 5 – Organised around customer need:** Use technology to transform our approach to service delivery, streamlining services and removing obstacles. Thereby enabling the council to provide more tailored/ value added services for those who need them.
- 2.4 In 2021, Methods completed a Key Business Systems Review that recommended that South Norfolk Council and Broadland District Council undertake an exploration exercise to better understand the quantifiable benefits that digital technology could deliver against the First-class customer service principles set out above.

- 2.5 The adoption of digital capabilities and new technologies would enable the One Team to achieve its strategic principles and, the vision set out in the ICT and Digital Strategy through redefining customer journeys, transactions and processes that will reduce inefficiencies and enable the One Team to achieve an optimised model of customer experience.
- 2.6 To understand the customer experience across the One Team and identify the benefits that could be realised against each strategic principle a discovery phase is required with an estimated total cost of £110,000 with Broadland District Council's total contribution of £49,500.
- 2.7 The discovery exercise will include an analysis and assessment of where and how the customer journey and customer experience can be improved along with a Future-State analysis and construct of what a First-Class Customer Service and Customer Experience should look like from a People, Process and Technology perspective – the sorts of solutions we should consider, and the level of business benefit we can expect to achieve through the implementation and adoption of the proposed solutions.
- 2.8 This Discovery Phase will be Phase 1 of a wider initiative to implement First Class Customer Service and will serve to inform the content of this initiative in terms of the current situation, the opportunity for improvement, the sorts of solutions we should implement, the associated cost and timeframe estimates, and the resulting business.

### **3. Current position/findings**

- 3.1 In 2021, the One Team initiated a Key Business Systems Review with the intention of producing a roadmap for system consolidation that supports the One Team collaboration, namely our Systems Transformation Programme.
- 3.2 The review identified at a high-level some key challenges and shortfalls in the customer experience driven by technological infrastructure and inefficient processes. However, more detailed analysis is needed to better inform the solutions we could implement and the quantifiable benefits that could be realised against the investment needed.
- 3.3 A summary of the findings from the Key Business Systems review are highlighted below:
- Limited system integration between the councils and different departments within them.
  - Different and inconsistent customer journeys across the two councils and its systems.
  - No central customer record or ability to share customer information across the councils and its services as customer information is currently stored in disparate systems which do not communicate with each other.
  - Large technical debt and multiple ICT workaround fixes that absorbs resource and capacity.

- Multiple customer records without a master record and unconnected accounts.
  - Rolling contracts for multiple systems without market assessments taking place, although this is being addressed through the implementation of consolidated systems.
  - Limited Case Management functionality or the ability for different business areas across each council to work collaboratively.
  - A fragmented customer service operating model, with little resilience against a backdrop of increasing demand.
  - A lack of joined up data, management information or reporting.
- 3.4 Some of the above challenges have been addressed through the success of the System Transformation programme, the consolidation of our line of business systems and introduction of the data and intelligence tools through our PowerBI programme. However, some of these challenges remain.
- 3.5 The focus of our transformation to date has been largely centred on the implementation of technology to meet contractual end dates, alongside internal process tweaks and the alignment of policies and procedures to yield efficient working practices as set out in the collaboration feasibility study.
- 3.6 Transformation has been driven within structural hierarchies; service-by-service or directorate. The recognition that transformation is cross-cutting and spans across organisational boundaries has led to a refocus of the way we group our projects and programmes with the introduction of a thematical approach.
- 3.7 The opportunities presented by the Beyond the Horizon programme has further influenced the need to shift our transformation efforts away from system consolidation and technology implementation towards the way we serve customers and the experience they receive from us through a programme of transformation work called 'First-Class Customer Service'.

#### **4 The First-Class Customer Service Portfolio**

- 4.1 The First-Class Customer Service portfolio positions technology as an enabler and sets out to maximise the efficiency of our One Team collaboration by transforming our core services to the end goal of delivering first-class customer service. **Appendix One** sets out the detail on the structure of this portfolio and its three associated programmes of work.
- 4.2 Without this key shift in focus customers will continue to find the process of engaging with departments or services ineffective, fragmented, and unsatisfying, ultimately hampering how customers feel about their interactions with the One Team.
- 4.3 The need to deliver a first-class customer experience is coupled with the backdrop of ever-increasing demand and rapidly changing customer expectations all contributing to the need to do things differently and continue to deliver more within existing resources.

- 4.4 Currently our customer contact routes are limited, and our demand is serviced via our higher cost channels such as, phone.

Average cost per transaction by channel				
Source	Face-to-Face	Telephone	Post	Online
PWC Report	£10.54	£3.39	£12.10	£0.80

- 4.5 A first-class customer service can achieve smooth, collaborative management of customers, can accurately channel and predict demand for services to ensure that customer requests are promptly dealt with in a way that reduces failure demand, removes pressure on back-office departments and reduces cost.

## 5 Potential Benefits

- 5.1 The benefits of delivering a first-class customer service relate to real cost and efficiency savings, notably:

- Improved Customer choice and access through the provision of additional contact channels e.g., online portal, chat, etc. which do not always require costly human intervention. For example, Durham County Council has seen the number of customer requests being made online soar since the GovService launch. This dramatic shift in contact channel has already identified over **£250,000 in annual savings**, a figure that continues to grow over time.
- Replaces poor working practices that waste time, improving efficiency and enabling more value-added work to be completed. For example, North West Leicestershire Council created time efficiency savings through integrating online forms of **1,641 working hours** equivalent to **226 working days**.
- Increase customer satisfaction, customer experience and service quality through the introduction of automated workflows, robotic processes and a reduction in failure demand. For example, Wrexham Borough Council adopted a CRM and looked at provide timely reminders to residents about their bin collection days. This has resulted in:
  - **48% reduction** in missed bin calls
  - **27% reduction** in contaminated recycling bins
  - **8hr job** that is now fully automated without human intervention.
- Could enable a reduction in the number of siloed software applications.
- Targeted marketing campaigns around services, events, business and tourism to build levels of engagement and yield improved marketing success by enabling us to better understand and segment our customers.
- Better communication and knowledge sharing between services and departments.

## 6 The Approach – Discovery Phase



- 6.1 The discovery phase is designed to better understand the current customer offering across services, document the current landscape as well as the future state of customer experience and outline the technological solutions that could deliver it.
- 6.2 The discovery phase and analysis will take approximately 6-8 weeks, this is looking at as-is processes to identify current state and where potential efficiencies could be achieved through the digitalisation of end-to-end customer journeys and the technological solutions that underpin it.
- 6.3 It is recommended that this discovery phase is undertaken to better understand costs, benefits and implications with a view to building a full business case for a customer solution(s) that deliver against our strategic principles. An outline of the proposed approach is detailed in the table below.

Activity	Description
Current State Analysis	Identify and define required roles and responsibilities, Access workforce and highlight resourcing gaps, Cost analysis and options appraisal to fill gaps
Service Process Catalogue	Engage wider business to understand business processes, develop 'as-is' service process catalogue, Initiate Service Design
Evaluation and Procurement	Assessment of current market, Alignment of option against requirements, Initial recommendations. Finalise SNBC requirements and take to market, assist with assessments and interviews, assist in final decision making
Configuration (install / set)	Mobilise, define, agree key components and standards. Create relevant templates to expedite delivery and ensure consistency of build and configuration
Total	£85,000 - £110,000

- 6.4 It should be noted that this discovery phase will not deliver a digital customer experience solution, but a suggested programme of work, costs and benefits to inform a full business case to seek approval for the required investment for the recommended technical solution to inform the delivery of first-class customer service.

## 7 Indicative Timescales

- 7.1 Outlined in the table below are some indicative timescales associated with the delivery of a fully costed business case. These timescales are indicative and will be influenced by capacity within teams to support the discovery phase analysis alongside other in-flight projects, procurement process and supplier lead in time.

Activity	Indicative Timescales
Cabinet agreement to proceed to discovery phase	Q3
Procurement starts	Q3
Contract award	Q4
Discovery phase initiated	Q4
Discovery phase completed	Q4
Full Business Case to Cabinet	Q4

## 8 Procurement

- 8.1 The most appropriate procurement route will be followed to allow for the work to be completed.

## 9 Proposed action

- 9.1 It is proposed that South Norfolk and Broadland District Council initiate the discovery phase to inform the vision of first-class customer service and the proposed technological solutions and programme of work that could deliver it.

## 10 Other options

- 10.1 **Option 1 - Do Nothing:** Cabinet could choose not to initiate the discovery phase to inform our approach to first-class customer service. Continue with current disparate line of business systems and fragmented customer journey. This option would preserve the current technology architecture and customer experience and see IT services continue to build bespoke point-to-point solutions for the integration of applications, using middleware or process automation tools where point-to-point integration is not available.

Pros	Cons
Tried and tested approach	Relies on limited in-house resource
Some in-house resource already skilled	High technical skill level required
No additional capital or revenue investment needed	Does not provide workflow and SLA management around customer interactions
	Is not providing a consistent and improved customer experience
	Does not move the Councils forward on delivery of their digital and IT strategy.
	Incurs continuation of technical debt with increased risk and cost from managing increased demand.

## 9. Issues and risks

- 11.1 The full business case may present an inviable position of investment or may not be approved. There will remain value from the completion of Phase 1 discovery

work that has been completed in helping the One Team to understand customer demand, make small scale improvements and drive our customer services target operating model.

- 11.2 A CRM solution may not be the recommended solution after analysis.
- 11.3 As part of the discovery phase there may be wider recommendations that will need considering under the First-Class Customer Service programme which may require further investment.
- 11.4 **Resource Implications** – Although the discovery phase is likely to be light touch, timing to engage the organisation in this work is critical and will need to be assessed against the wider programmes and projects already underway such as, Beyond the Horizon and the IT Fundamentals work as to not overburden teams with the volume of change.
- 11.5 **Legal Implications** – using a procurement framework for this evaluation and appointment ensure compliance with public contract regulations.
- 11.6 **Equality Implications** – None. This is not delivery or implementation.
- 11.7 **Environmental Impact** – None
- 11.8 **Crime and Disorder** – None

## **12 Conclusion**

- 12.1 The need to transform our customer experience solution was identified in the Key Business Systems review and the ICT and Digital strategy. An improved customer experience is a key contributor to our strategic objectives.
- 12.2 An improved customer experience is thought to have the potential to deliver efficiencies and contribute towards our One Team collaboration objectives. This is the first stage in supporting us to fully understand what a first-class customer service means for the One Team and the options for delivering it. Include here your reasons for the recommendations.

## **13 Recommendations**

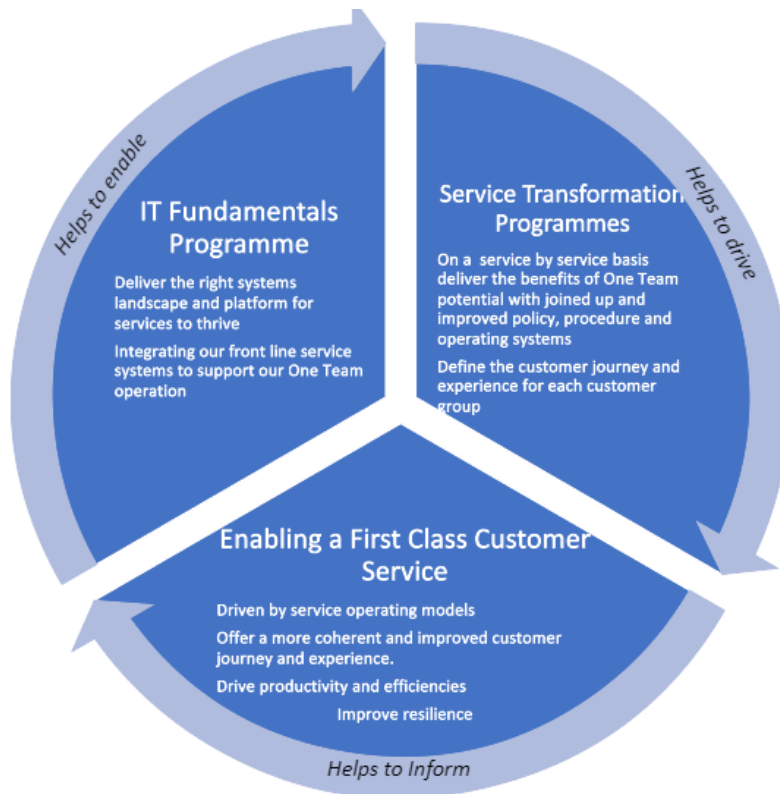
- 13.1 To agree to initiate the discovery phase as the first phase towards establishing the current state, the future state and the underpinning technology to inform a fully-costed business case for investment to deliver a First-Class Customer Service.
- 13.2 To utilise the £110,000 from Earmarked Reserves agreed by Cabinet on 8th February 2022 with Broadland District Council's contribution of £49,500 to be used on consultancy resource to support in the development of a full outline business case.

## Background papers

None

## Appendix One

The diagram below illustrates the programmes that contribute to the First-Class Customer Service portfolio.



**NOT FOR PUBLICATION BY VIRTUE OF SCHEDULE 12A OF PART 1 PARAGRAPH  
3 OF THE LOCAL GOVERNMENT ACT 1972 (AS AMENDED) BY THE LOCAL  
AUTHORITIES (ACCESS TO INFORMATION) (VARIATION) ORDER 2006  
(contains information relating to the financial or business affairs of any  
particular person (including the authority holding that information))**

Pages 21 to 33 are not available to  
the public because the information  
is confidential as it includes exempt  
information about the financial or  
business affairs of a person