



Customer First 2005-2008

Our Vision:

...Where possible, any customer who comes into contact with Scottish Councils should have their service delivered, their problem resolved, or their question answered at the first point of contact. This means no unnecessary form filling, no asking for information that has already been given, no unnecessary referrals to other members of staff or other organisations...

A Scottish Executive programme in partnership with Scottish Councils supported by the Modernising Government Fund.

THE IMPROVEMENT SERVICE

The Improvement Service (IS) is a partnership between the Scottish Executive, the Convention of Scottish Local Authorities (COSLA) and the Society of Local Authority Chief Executives in Scotland (SOLACE). Our purpose is:

"To work with Scottish Councils, their Partners and Stakeholders to improve the efficiency, quality and accountability of local Public Services across Scotland."

CUSTOMER FIRST

Customer First is a Scottish Executive sponsored programme developed in partnership with Scottish local authorities and managed, with the support of COSLA and SOLACE, under the direction of the IS.

It supports the IS principles of: easier to access, better integrated, local services; effective collaboration across the public sector; better use of public resources; high standards of public service; and willingness to innovate and learn from others.

It underpins the Executive's commitment to provide financial support for, and work in partnership with, all 32 of Scotland's Councils to:

- Deliver more convenient and responsive public services.
- Encourage the take up of online (self-service) access to services.
- Ensure that at least 75% of core service requests can be dealt with at the first point of contact.

As well as meeting the challenge set out in the Partnership Agreement to deliver excellent public services, the programme will also contribute to the targets for delivering efficiency savings across the public sector.

Customer First – Achieving Our Objectives

Customer First can only be successful with the support and leadership from those best placed to influence and manage change. Culture change, to ensure the right balance is struck between local and Scotland wide service delivery; business process design change, to build and deliver services around the needs of the customer; technology change, to make sure that staff have the relevant information and knowledge - at the time that they need it - to ensure first time delivery. Customer First will:

- Be managed under the direction of the Improvement Service Board, to provide both the political and the senior management influence that can promote the programme and the take-up of its products and outputs.
- Establish a Customer First Management Board to provide strong governance on behalf of the IS Board and call upon senior management figures from across the whole public sector to provide advice and guidance.
- Publish a strategic framework for the programme, underpinned by an annual business plan to ensure that the aims, objectives, deliverables and accountability for the programme are clearly communicated.
- Appoint a strong Programme Management Team, to ensure that the business plan is delivered, and is underpinned by clear project plans that show the timescales and the targets for the programme.
- Introduce a benefits realisation programme to demonstrate how the citizen, staff within the local authorities, public sector organisations and the wider efficient government agenda, has benefited from the programme.
- Continually consult with citizens, with organisations and with staff to validate the relevance of the programme.

Customer First: How will the public sector benefit?

Councils hold large amounts of the same data and information, which is not always valued as a corporate asset (or as an asset to the wider public sector who have the same customer base). Failure to share information can reflect badly on the public sector, with accusations of: not being joined up; being overly bureaucratic; incurring unnecessary high costs; poor communication; delivering lower standards of customer service. By sharing critical information - within a secure public sector infrastructure - Customer First will help to manage and reduce the risks associated with the exchange of information across the public sector.

Traditional systems implementations in the public sector do not always support common developments that deliver economies of scale. Customer First will - through the IS - provide an agent for promoting joint investment in a common infrastructure that supports shared / managed services, and provide a secure data sharing infrastructure that ensures critical 'life event' details are shared for the benefit of citizens, with the consent of citizens.

Customer First: How will the customer – the citizen – benefit?

Customer First, will help to develop public services where:

- Customers will have a choice in how they transact with Council services - by phone, face-to-face, online or at home (where appropriate).
- A national training programme will develop multi-skilled Customer Service Staff who can deal with a wide range of service requests from the front office.
- The most frequently requested – core – services will be targeted for improvement, 46 services have been identified with Councils.
- Customers who telephone a local authority should have their call answered first time (some Councils have already set a 95% target for this).

- Customers will have the majority – 75% - of their core service requests dealt with at first contact.
- Improved business processes will reduce transaction times and costs, with business process maps being produced for the major services.
- Customers, whose calls need to be referred, will not have to repeat their details. A single electronic customer record - a citizen's account (CA) – will provide the facilities to monitor transactions against the account, and the relevant staff – via a Customer Relationship Management system (CRM) - will have immediate access to those transaction details.
- Along with the citizen's account, there will be an opportunity to have a single entitlement card (smartcard), which can replace the many and incompatible schemes that currently exist. The first roll out of the card will support the new national concessionary fares scheme.
- Along with their citizen's account, customers will have a secure public services network to ensure that changes to basic (life-event) circumstances – address change, name change, notification of death – will be accurately and securely handled, e.g. neither grief nor public embarrassment will be caused by sending correspondence to the wrong person, the wrong address, or to someone who is deceased.
- Through a common A – Z of public services the Scottish Executive, in partnership with Councils, will promote and encourage the take up of online – self-service – customer transactions. Including authenticated transactions, authenticated access to services and the facilities for customers themselves to enable and to update their citizen's account.
- Develop common standards and targets for measuring and publishing customer satisfaction ratings (some Councils have already set 95% as the baseline measure)

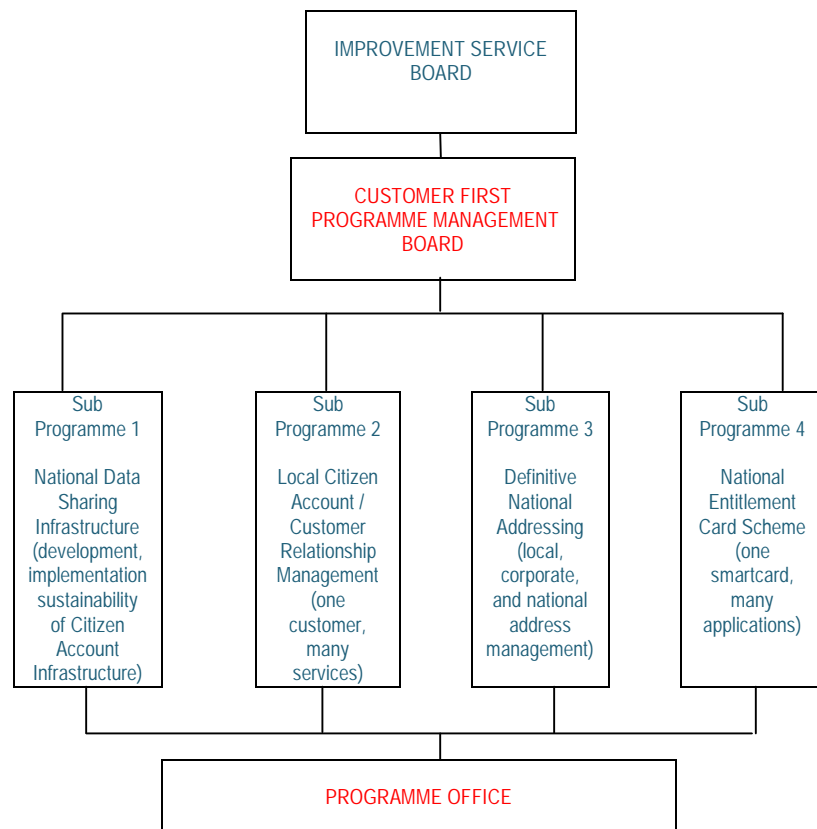
Customer First - The Business Planning Framework 2005/06

The 2005/06 priorities (as agreed by the Programme Management Board) are set out under the broad objectives below, to:

- *Deliver a 'proof of concept' version of the national infrastructure and messaging hub that can support a secure Citizen Account and Property Address Gazetteer. Ensuring that business processes can maintain the integrity of the infrastructure and authentication processes can ensure that only updates from a trusted source are able to alter the status of an account..*
- *Establish a working version of the Citizen's Account and demonstrate that it can be enabled to support a number of local and national entitlements under the national entitlement scheme.*
- *Deliver an early operational version of national voluntary entitlement card scheme to accommodate the concessionary fare by 1 April 2006.*
- *Deliver, via the local Council CRM and back office integration process, a model for the development of single point of contact for the first time delivery of public services (to be able to track transactions via a sustainable citizen account and provide an accurate data source to help sustain the national infrastructure).*
- *Deliver a sustainable corporate gazetteer in every Council, integrated - via the CRM - into the local back office systems, and help to develop the business solution for a sustainable address gazetteer within the national infrastructure.*
- *Establish a procurement function that can deliver economies of scale in procuring goods and services for the Customer First programme and its partners.*
- *Establish a benefits realisation programme for Customer First to ensure that first time delivery of core service requests can be monitored and efficiency savings can be measured.*

Customer First – Governance Model

The Customer First Management Board will oversee and manage the programme under an Operational Services Director. Four sub-programme boards, each under the chairmanship of a Board appointed Senior Responsible Officer, will ensure that the national infrastructure requirements and developments are properly co-ordinated with local projects. A Programme Office has been established to ensure that the appropriate resources are in place to deliver the programme.



The Operational Services Role of the IS

The Director of Operational Services will be responsible for:

Reporting - through the IS Chief Executive and the Management Board – the progress of the Customer First programme.

Supporting effective collaboration between Councils and their partners to exploit the opportunities for developing shared services around the Customer First outputs and products.

Helping to make the most efficient use of resources by identifying opportunities for the IS to act as a wider public sector agent for the delivery or co-ordination of the managed services that can be built upon the Customer First outputs and products.

Sub-Programme 1 – National Infrastructure (Data Sharing)

To help ensure that citizens get the services that they are entitled to by establishing a secure and sustainable national data-sharing infrastructure, which includes a citizen account and citizen entitlement status, linked to an address gazetteer. The account will only be enabled with the informed consent of the citizen and secure business processes will ensure that only updates from an authenticated (trusted) source are able to alter the status of an account.

Key Tasks in 2005/06 for National Infrastructure:

- Establish data standards for the citizen account, Unique Citizen Reference Number (UCRN) and Unique Property Reference Number (UPRN).
- Produce a pilot citizen account, registration and authentication model.
- Begin a national procurement process for the citizen account infrastructure.
- Produce the first iteration of citizen account (populated with UCRN) and related customer address.

- Establish business processes for account management.
- Transfer pilot citizen account and address data to national infrastructure.
- Complete the population of national data set with UCRN and UPRN.
- Test live business processes for maintaining national datasets.
- Test authentication processes for citizen's own maintenance of their account.

Sub-Programme 1 – National Infrastructure (Citizen Account)

To establish the Citizen Account; to test the implementation of it for the award of the national concessionary travel scheme and work with Councils to develop the account for the local award of benefits and entitlements.

Key tasks in 2005/06 for National Infrastructure / CA:

- Identify business processes to establish age related entitlements.
- Populate citizen account with entitlement data.
- Verify entitlement through data matching and cleansing from existing concessionary fare data.
- Implement registration and consent processes to set up the account.
- Issue standardised consent form to enable the account and produce the entitlement card record.
- Implement a bureaux service to convert the citizen account record to enable printing and distribution of the citizen entitlement card.

Sub-Programme 2 – Local Citizen Account / CRM

To work with Councils to: develop the local citizen account along with local CRM priorities; develop a single point of contact for the first time delivery of core services; train multi-skilled front-office customer services staff who can deal with a wide range of enquires. We will also work with Councils to develop a common A-Z of services for the promotion and take-up of online (self-service) transactions.

Key Tasks in 2005/06 for Local Citizen Account / CRM:

- To encourage all Councils to implement and publish a Customer Services – Customer First – strategy.
- To work with Councils to implement a common approach to the roll out of the local citizen account and Customer Relationship Management process.
- To introduce an accredited training programme for Customer Services staff.
- Undertake stakeholder consultation and engagement in the development of Benefits Realisation Framework.
- To implement a Benefits Realisation Programme that can monitor and measure time / cash releasing savings achieved through more efficient business processes and more effective customer transactions.
- To measure 'first-time' delivery of core services, towards a target of 75% delivery at first point of contact.
- To work with Councils to implement a standardised set of procedures for monitoring and measuring customer satisfaction.

Sub-Programme 3 – Definitive National Addressing

To work with every council to deliver a sustainable corporate address gazetteer that can be integrated into the local authority back office systems, and provide an accurate data source to sustain the national infrastructure.

Key Tasks in 2005/06 for Definitive National Addressing:

- To review every Council's progress towards a "First Cut" gazetteer.
- To support best practice across Councils in the use and development of property / address based data.
- To implement quality assurance and quality control processes to ensure the accuracy of address based data.

- To develop the technical options / business model for the national gazetteer.
- To create a definitive national address gazetteer for the Scottish public sector.
- Implement data matching, cleansing for address gazetteer sustainability.
- To work with all public bodies to develop shared / managed services that can be built upon the national gazetteer

Sub-Programme 4 – National Entitlement Card Scheme

To deliver a national, voluntary, entitlement card scheme and a single platform for the wider development of smartcard technology across Scotland. By April 2006 over 1 million elderly and disabled citizens will have been issued with a single smartcard that will give them access to the travel concession.

Key Tasks in 2005/06 for the National Entitlement Card Scheme:

- Agree the technical solution and the local / national branding requirements for the national implementation.
- Initiate the national entitlement card procurement.
- Establish the managed service requirements / bureau facilities for card production and distribution.
- Begin to populate the citizen account with concessionary fare data.
- Establish card production and card distribution process.
- Design a Card Management System based upon citizen account status.
- Complete the roll out of the entitlement card to concessionary travel holders.

Staff

Colin Mair, Chief Executive

Jim Kinney, Director of Operational Services

Sid Bulloch, Senior Project Manager, National Entitlement Card
Ivan Condon, Procurement Executive

Programme Managers:

Cameron Walker, National Infrastructure (Technical Architecture)

Paul Nichol, National Infrastructure (Citizen Account)

Iain McKay, National and Local Address Gazetteer

Martin Brown, Local Citizen Account / Customer Relationship Management

Tom McHugh, Benefits Realisation

Programme Office

Fiona Dick, Communications Officer

Admin Support

Further Information

Improvement Service

Customer First Programme Office

c/o Stirling Council

Room 116, Viewforth Complex

Stirling FK8 2ET

Tel: 01786 443250

email: dickf@stirling.gov.uk