Digital Experts Programme Test Valley Borough Council case study

The issue and context

Test Valley Borough Council is a local authority located in Hampshire, in the south of England, with a population of approximately 120,000. 52,000 properties are registered for council tax. The population is also relatively digitally ready. According to Go ON UK, the UK's digital skills charity, 77 per cent of adults in Test Valley have all five 'basic digital skills'[1], and 39 per cent of adults in Test Valley have used all five basic digital skills in the last three months.

The key impetus driving the roll-out of the new system was the council's decision not to renew the contract for their existing CRM system. The customer service unit had been the first point of contact for all council tax queries, with the CRM system managing contact and handing over customer details to the back office. With the planned removal of the CRM system, the council tax service looked at alternative means of managing customer contact and consequent workflow.

Alongside this, the council was looking to achieve efficiency savings from the project. Test Valley's budget forecast for 2017/18 shows an estimated deficit of £679,000. The council sought options that would deliver a seamless and supportable council tax and non- domestic rates self-serve facility and e-billing solution. The council sought funding from the LGA Digital Experts programme to support this project.

After internal and external consultation in line with procurement procedures (including a site visit to Cambridge City Council), the acting Head of Revenues recommended the purchase of the Northgate Citizen Access tool. Customers using the tool have the option to transact online including to:

- View their account online
- Submit change in circumstances e.g. change of address
- Apply for or cancel a discount
- Set up a direct debit
- Check council tax band or rateable value.

The above transactions represent the most common and straightforward transactions to process. More complicated scenarios will still require the local taxation team to process them in line with existing practices.

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[1] The five 'basic digital skills' are managing information, communicating, transacting, problem-solving and creating – for further information see https://www.go-on.co.uk/get-involved/basic-digital-skills/

The project objectives and targets

The objectives of the project are to replace the current CRM system with a new tool which will streamline the council tax process for customers and the council alike. The project:

- Offers 24-7 access
- Reduces avoidable calls
- De-duplicates the handling of customer data by front and back-office
- Reduces delays in setting up accounts – which resulted in customers having less time to pay, and potentially higher instalments.

Under the old process, there was substantial duplication as the information captured via the existing forms software – input either by customer service staff or the customer themselves – had to be re-entered into the back-office council tax system. In contrast, a customer interaction using the new citizen access portal can be set to process automatically.

In addition to making the process more efficient by reducing duplication and the use of associated resources, another objective was to benefit the customer by offering an additional contact channel, available at a time that suits them, as well as a significant reduction in the turnaround time of their request. For example, processing a straightforward resident's house move could take 3-4 weeks under the old system – though this could be higher or lower at different times of the year. Using the new system, straightforward processes can now be completed on the same day.

From an internal perspective, the objective was to remove many of the steps outlined below. As the diagram depicts, a customer would call customer services to make a change to their council tax, and a member of staff would fill in a static e-form. This was then sent to a back-office system and imported into a document management system. At the busiest times there would be a delay before these processes were progressed by council tax staff. In the meantime, the customer might call back, meaning the customer services team were taking repeated and avoidable calls.

Figure 1. Customer interaction 'before' - under the original system

Start to finish of the above process would take an average of 3-4 weeks.
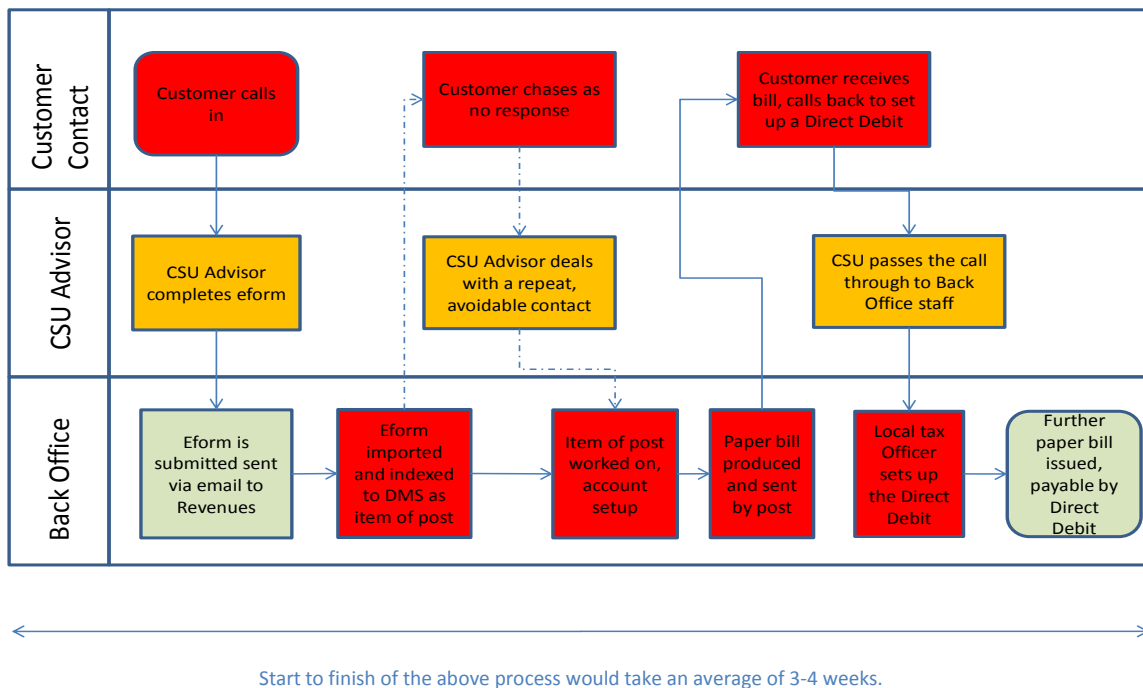
The approach and progress to date

The implementation of the Citizen Access product was managed by a project team comprising members from the Revenue Systems team, Customer Services and Local Taxation. The project reported regularly to the Transformation Board, led by a corporate director with representatives from across the council including Communications, IT, Audit and Revenues – among others.

Having procured the Citizen Access Portal in early 2015, Test Valley Borough Council worked with Northgate to agree a project plan and timescales. The council's internal IT team then built and commissioned the hardware required, and Northgate installed the software in mid-May 2015.

The next stage was to setup a workshop run by Northgate for Test Valley Borough Council employees. The aim was to scope and develop the parameters for the system and agree a test plan. An example of a parameter is the number of days in the past or future that the system would allow a notification to process – for example, a customer asking for a discount to start from a week ago would be processed automatically, whereas a customer keying in a date two years ago would not go through.

Testing the system then took place over June to August 2015. This involved the local taxation staff as well as project team members. Two months were allowed for the testing so it could be managed around the availability of council tax and customer services staff – all of whom would spend much of their time dealing with live customer issues and processes. Initially, the project used scenarios to test the system. So the project team would take on the role of customers wanting to change address or occupancy details – and then check to see that the back-office system and accounts were amended correctly.

Later in the process, staff continued to test the system by rekeying data from existing forms completed by customers as real 'dummy' data.

The Customer Access Portal went live with customer service advisors on the 24th August. Those involved in the testing phase became expert users who subsequently trained the other advisors. In the first week, 75 per cent of notifications successfully auto-processed. By the end of September all CSAs were using it – taking calls and using it in face-to-face interactions with customers.

During the autumn 2015 staff continued to check 100 per cent of the successful notifications to make sure that everything has been processed successfully. However, as they were satisfied that all was working as it should be, from mid-December they ceased manually checking notifications. This was a significant milestone as it meant that the system was now ready for public use. The site went live on www.testvalley.gov.uk/counciltax on 23rd December – as a soft launch, without promotion. Within the first three weeks 40 notifications were submitted by customers all of which were processed without issue.

As of December 2015, residents could apply for a direct debit, change their address, apply for or cancel a single person discount, update their name and contact details, and sign-up for e-billing.

Test Valley Borough Council has taken the opportunity offered by the March annual billing run to promote the new online services on the back of the bill. Further promotion plans include emailing all residents who receive information regarding their garden waste subscription electronically. The council has also published a promotional article in Test Valley News, its residents' newspaper, as well as posting links from the Test Valley Borough Council website and new My Test Valley app – which can be accessed via tablets and smartphones.

The outcome - successes and challenges

The main outcome is that the new system improves the customer's experience, reduces avoidable contact and duplication, as well as speeding up the process both for the customer and the council.

Figure 2. Customer interaction 'after' the introduction of the new system
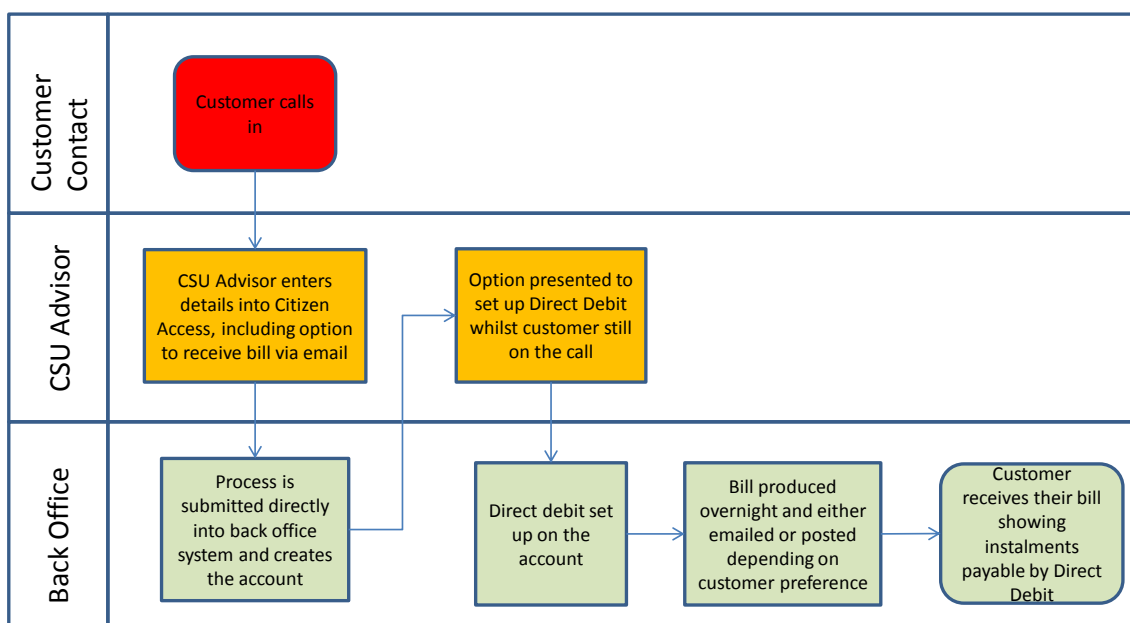
Start to finish could be less than one working day for straightforward transactions

In terms of financial benefits, the efficiencies arise from calls avoided and process efficiencies. Based on a model that every notification submitted by customers has avoided a call (with a cost estimate by SOCITM to be £2.82), and every notification submitted by customers and advisors alike helps avoid the duplication of work that previously arose from staff taking a complete form and rekeying the data into the back-office system (amounting to 5-6 minutes of time, for illustration valued at £2), then the emerging financial benefits are clear.

Figure 3. Volume of transactions via the new system at 17 March 2016

	Contact avoided £2.83	Process efficiency £2	Total efficiencies
Since August 2015 – No. of notifications submitted by advisors		3,408	£6,816
Since December 2015 – No. of notifications submitted by customers	420	420	£2,029
			£8,845

Key learning points

- Taking time to understand and capture the existing process helps demonstrate the inefficiencies caused by duplication and avoidable contact. This helps create the case for change.
- Taking time to let staff become comfortable with the new system before launching it to the public was key. The first people the public would turn to if they had issues with the product was staff, so it was important staff were familiar with the new service.
- Getting the right people involved, including representatives from the staff managing the back-end processes such as local taxation officers, in the testing helped ensure shared understanding and buy-in to the new system.

Next steps

The major task is to continue to promote the Citizen Access Portal to residents, and to monitor transaction volumes during the busy billing cycle.

Contact for further information

For further information on this project, please contact:

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