

# CUSTOMER SERVICE ENHANCED BUSINESS CASE

Fit for Purpose PORTFOLIO

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## 1 Section A – General Information

This section is a high-level overview of the Programme and its scope

### 1.1 A1 - Programme Summary

This programme is to implement the Customer Service Strategy and to embed change and improvement in how the Council delivers its services to citizens through all access channels. Research conducted through the strategy development has highlighted that:

- customer service is inconsistent
- opportunities to digitise and automate to improve interactions are not being taken up
- customers are bombarded with too many access points
- a good deal of our online content is poor and needs improving
- high numbers of complaints and other failure demand (chase ups, etc)

In addition to the lack of consistency across different services, we need to acknowledge that expectations from our citizens are increasing, they expect to be able to transact with the Council online, and for those services to be good, to keep them informed and simply work without hiccups.

A partner was commissioned to support us in developing the strategy and highlighting to us where we needed to target our efforts in order to improve. This work has been invaluable in helping us to form our approach and devise a strategy that will help us embed it so that continuous improvement to customer service becomes second nature.

This presents a huge opportunity for the Council with outcomes such as:

- Improved customer service across a range of priority service areas
- A method/internal capability for delivering ongoing service improvements
- Improved reputation for the Council and reduction in complaints
- Reduction in costs as failure demand is tackled
- Cultural change and the embedding of agile practice through delivery

Work with our partner in the development of the strategy helped us split the work needed to implement it into three tranches, of which tranches 1 & 2 have already been delivered. Tranche 3 has identified 8 business cases that will make up the initial projects to go into the programme “backlog” or pipeline of projects to be worked on. These projects will test our teams in delivering end to end services across a range of technical capabilities, that have the ability to underpin and enable transformational change across the Council. These are:

- Smart communications: chatbots and automation to handle enquiries
- Internet of things – devices and sensors to predict damp in properties
- Robotic process automation: reminders, data entry
- Pre-emptive demand: renewals and reminders for garden waste
- Customer journey automation: automating pest control and retail markets licencing
- Digital Engagement: video based diagnostics for self repair and first time fix
- Joining up data sets: using data from other sources to tackle illegal HMOs

Optimising customer services: savings opportunities in delivering best practice customer service – improving the end to end service with technologies and tools.

Given the scale and nature of the services in Tranche 3, we have reviewed our delivery options and are proposing to deliver this programme using Agile methodology. Although this methodology is new to Birmingham City Council, it is a tried and tested methodology and is an ideal delivery methodology for this type of programme; where detailed designs and benefits cannot be put in place until there is research and engagement to design the service in a multi-disciplinary team. The way that the Council worked to deliver Covid (in cells of empowered multi-disciplinary teams) is the nearest equivalent for Birmingham, and the excellent work delivered should give confidence that the organization can adapt to this style of programme delivery at scale.

These projects represent an example of the types of opportunities the council can deliver, however, they will not be all that the programme will look at delivering in this timescale, other opportunities will be reviewed and prioritised with the aim of delivering products and benefits rapidly, building capability and experience. The project will put in place a prioritisation matrix which will look at the value to customers/the Councils delivery plan, the complexity to build, and the engagement and buy in of the service area to implement the change. The programme will have a gateway for each project after the discovery and design phase before it is put into the pipeline for delivery. Those projects not delivering sufficient value will be rejected. The programme will ensure that benefit realisation is achieved through completing another baseline 2 months after a project is live. This will be done in conjunction with the Finance Programme lead who will ensure that budgets are adjusted accordingly.

This business case is asking for funding to deliver the first year of the strategy, a follow up business case will be presented after that time for the remaining years of the strategy.

## 1.2 Organisational Context

Through the Birmingham City Council Delivery Delivery Plan (2020–2022), we have committed to addressing a number of significant customer issues, namely that people will not tolerate unreliable services that fail to join up around their needs and don't involve them as equals; that force them to be passed from pillar to post, that ask for information more than once, that fail to answer the phone or

respond on-line, or offer silence when what is needed are updates and assurances about progress. Birmingham City Council have committed to resolve these issues. The Council has defined some very clear spending objectives. The status quo cannot remain!

The activities of the programme directly support the Council's Delivery Plan outcomes of:

- Using innovative technology and processes to support making Birmingham an aspirational city to grow up and live in.
- Optimising services to support making Birmingham a great city to live in.
- Focusing our resources on the people that need it most, making Birmingham a fulfilling city to age well in.

### **Building on the work of the previous Citizens Access Strategy and ICT and Digital Strategy**

In 2016 the Council developed a 'Citizens Access Strategy'. This strategy, alongside the 'ICT and Digital Strategy', has delivered significant improvements to the way citizens receive services.

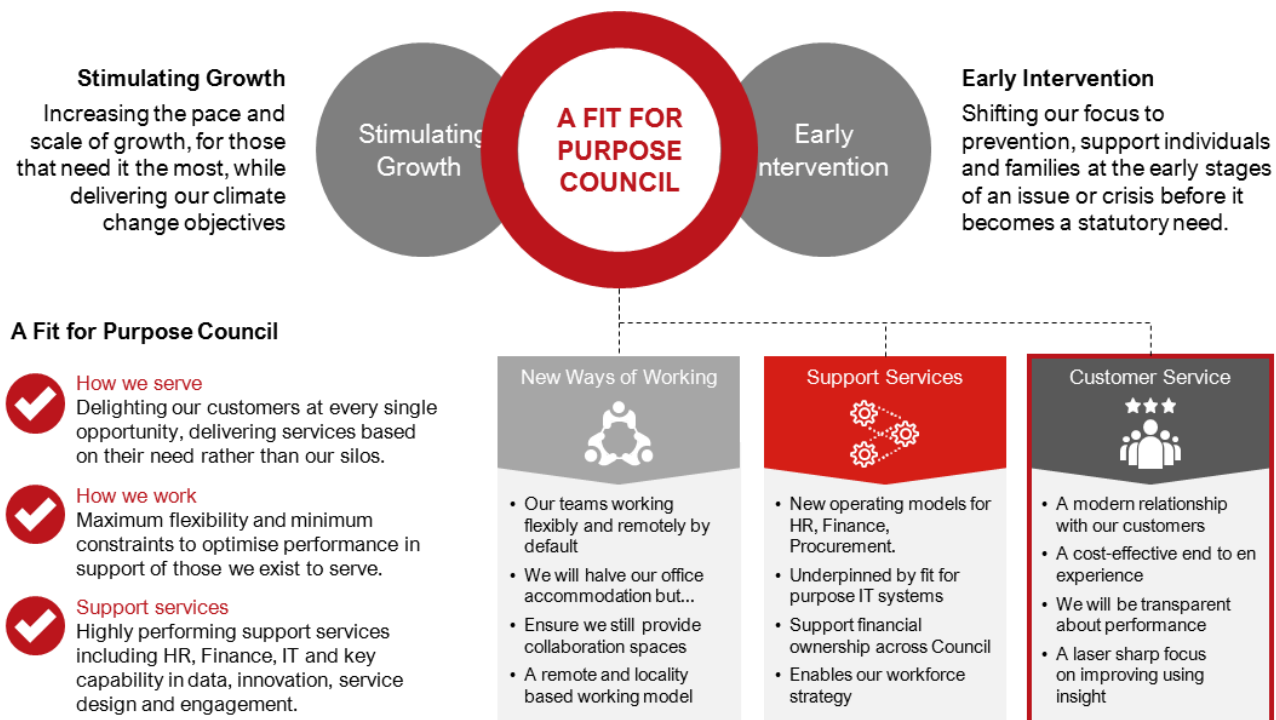
However, this strategy is over five years old, and while substantial progress was made under these previous initiatives, many things have changed. Including:

- **Our customers demanding better services** (particularly online). This is not just in the Local Government arena; Both central government and the private sector is experiencing similar changes. Just think how the banking sector has changed in recent years.
- **Digital tools have improved significantly**, becoming more customer-friendly and more integrated and better for everyone. As these advances, we need to re-invest to take advantage of the new tools, improved outcomes for residents or reduced costs (e.g., chatbots, AI tools etc.).
- **The COVID-19 pandemic** has meant many customers have not been able to visit us and have had to use other channels for the first time.

In light of these facts, Birmingham City Council overhauled the Citizens Access Strategy and developed a new Customer Service Strategy. The Customer Service Strategy has been through a number of iterations to ensure it meets customer needs and during September been subject to engagement with customer and citizen feedback. Further details of the engagement can be seen in Appendix B Customer Service Strategy Engagement feedback.

Organisationally the programme is part of the Fit for Purpose Council, one of the three strategic portfolios of work that form part of the Birmingham City Councils Delivery Plan.

**Figure 1 Fit for Purpose Council Portfolio**



The visual above provides a high-level summary of how the programme relates to our parent portfolio and other strategic transformation initiatives across the council. The Customer Service Programme is an integral part of the Fit for Purpose Council Portfolio, which comprises of the following investment objectives to:

- Improve the experience our customers receive when contacting the Council (effectiveness).
- Ensure we have the performance data to understand customer interactions and continually improve (efficiency and economy).
- Fund the improvements in the customer and business processes in a range of services (economy, efficiency, and effectiveness)
- Reduce the number of contact points and interactions customers need to navigate when contacting the council (efficiency)
- Train and empower staff to put customers at the heart of everything we do (effectiveness)
- Provide the Council with financial savings (economy)
- Ensure there is a continuous cycle of customer improvements in the future.

### **1.3 Customer Service Strategy context**

The Council is determined to make Birmingham a fair and thriving city where all citizens can achieve their potential and share in the city's success.

The impact of the pandemic, as well as the results from the recent customer engagement survey, have highlighted issues that have been hidden in plain sight for too long. For example, the customer engagement survey revealed that two-thirds of respondents are not satisfied with the quality of services provided by the Council. To address the issues, the Customer Service Programme has been identified to bring together, build upon and accelerate existing work to improve our customer



experience, whilst identifying and implementing the required activities to ensure we are a truly customer centric organisation.

While substantial progress has been made, this EBC for the Customer Service Programme has been prepared within the context of the council's Delivery Plan for 2020 – 2022 (see appendix for further details):

1. We will put customers at the heart of everything we do
2. We will use insight to inform how we best serve our customers
3. We will make digital the channel of choice whilst maintaining alternative channels for the most vulnerable
4. We will be transparent about our service standards and our performance against them
5. We will be innovative and improve efficiency and effectiveness

The Customer Service Programme seeks to address the current issues that exist across the Customer Services as a whole, the details of which are summarised below:

“The UK saw the equivalent of more than 12 years of ecommerce growth in 12 months”

“the pandemic accelerated the digitisation of customer interactions in Europe by three years and the partial or total digitisation of products and services by seven years, compared with the average rates of adoption in 2017-19”

***Source: Digital Transformation Report in the Times (Sept 2021)***

The pandemic has created a shift from the wider community to engage digitally far more than previously. The Council must catch up with customers and businesses in utilising digital channels while ensuring those who can't access digital or who need more targeted intervention are not left behind. This also raises the requirement to ensure our engagement with customers digitally is optimised. This will ensure we are not only doing the basics well when services are accessed but that we are also progressing at the rate of change needed to exceed customer expectations.

#### **1.4 Why change?**

In September 2021 the customer service strategy engagement survey received 1,530 responses.

The engagement survey questioned citizens, businesses, staff and visitors on satisfaction with council services and whether there is a need to improve council services, as well as opinions on the principles and themes of the customer service strategy.

Just under 67% of respondents said they were not satisfied with the quality of service received from Birmingham City Council.

Respondents were asked which services they were unhappy with, and a wide range of responses were received for services across the council. Services such as housing, waste collection and street cleansing, social care and council tax ranked highly.

The lack of satisfaction concerned activities such as how to book a service; not receiving responses to emails; finding the website difficult to navigate; not being able to contact specific staff; and not being treated with respect and feeling ignored, neglected and dismissed.

The survey also tells us that 92% of respondents agreed that Birmingham City Council needs to change and improve services.

When asked about the principles and themes in the customer service strategy, a high majority of respondents strongly agree or agree with the principles and the themes for improvement and change.

Regarding the principles:

**Table 1 Customer Engagement Survey Results - % agreement with customer service principles**

Principle	% Strongly agree/agree
We will work better together with you	79
Make quicker decisions for you	77
Reduce your need to contact us	75
Tell us once	71
We will put the citizen first	86
Taking a proactive approach to customer service	81

Regarding themes:

**Table 2 Customer Engagement Survey Results - % agreement with Customer Services Strategy themes**

Theme	% Strongly agree/agree
A customer focused council	79
A connected council	80
A smarter council	82
A connected city	78

The responses from the survey indicate that customers want changes to the customer service approach in order for it to provide them with an exceptional level of service.

Our 2021 tranche on analysis revealed that we have some work to do in order to improve things for the citizens of Birmingham. Here are some of the key headlines from our findings:

**Table 3 Service Review - Headlines**

Headline	Detail
<b>Excessive points of contact</b>	We have too many points of contact for our customers. There are 268 BCC websites; We point our customers toward 200 contact numbers and 151 email addresses; We request our customers send post to 113 postal addresses. This creates many invisible barriers for you to navigate. We also know this causes confusion and frustration. We need to rationalise the way customers contact us and simplify our processes. We need to untangle the lines of communication and streamline contact.
<b>Limited customer service feedback sought</b>	Only 5% of our directorates ask customers about satisfaction with their services. This means most of our organisation do not know what customers think about our services, how easy or not it is for them to transact with us, or how customers feel they need to improve.
<b>Under-utilisation of the Brum account</b>	Only <b>8</b> of <b>39</b> divisions across all Council directorates (or <b>21%</b> ) have services available on our customer portal (BRUM account). This causes our customers great confusion and disruption, e.g., having to sign on multiple times to different portals for different services. We need to change this and remove barriers that can prevent Customers from accessing our services.
<b>Some web forms are being utilised</b>	We want Customers to make requests for services at any time of the day or night, and that is why we have invested in digital technologies to put services online. So far, we have put 119 forms online, some of which need further enhancements to improve the Customer experience which can be disjointed and inconsistent. We need to standardise the experience, simplify the self-service tasks, and remove the various printable PDFs on the website that Customers still need to download and print off.
<b>Services in demand</b>	We know our services are very much in demand. We work hard to ensure we have sufficient staff and resources to cover that demand. However, we also recognise demand outstrips our ability to supply all the services Customer need particularly if that demand is in the wrong place or we have not utilised data and technology well enough. So, we will work with Customers to understand the pattern of their needs and match the staff and resources to the demand for our services. We will make better use of technology to provide insight into demand patterns.
<b>Resources where needed</b>	Some of our tools and systems are outdated or under-utilised. This can mean we use valuable staff time to complete tasks and activities that a system is more than capable of handling and can often do in a fraction of the time. We will look to use technology to provide simple activities and reinvest the time spent helping our citizens who are most in need of support.
<b>Email contacts aplenty</b>	We want our customers to contact us digitally, but we don't necessarily make this easy for them to do that or for us to deliver the service. There are 151 email

	addresses published! We don't think using emails helps you, and we find them difficult to process. We need to redesign your interactions with us digitally to make it as easy as possible to tell us what you need. We need to reduce the number of email addresses and increase the number of well-thought-out electronic self-service access tools.
<b>Contact centre under-utilised</b>	Only a small fraction of our services is provided through the contact centre. This means most callers to the council are not speaking to dedicated Customer Service staff trained to respond to your needs. We need to redesign our services to ensure qualified Customer Service staff are at the end of the line when customers call.

For the complete details of the Customer Service Strategy engagement, details can be found in Appendix B.

## 1.5 A2 – Programme Scope

In Scope
<ul style="list-style-type: none"> <li>• All citizen facing services are in scope of the programme.</li> <li>• Tactical web form and content improvements</li> <li>• Brum 3; inherited from the Council's Delivery plan.</li> </ul>
<ul style="list-style-type: none"> <li>• Priority service improvement projects from across the Council – initial programme pipeline (backlog) is <ul style="list-style-type: none"> <li>○ Smart communications: chatbots and automation to handle enquiries</li> <li>○ Internet of things – devices and sensors to predict damp in properties</li> <li>○ Robotic process automation: reminders, data entry</li> <li>○ Pre-emptive demand: renewals and reminders for garden waste</li> <li>○ Customer journey automation: automating pest control and retail markets licensing</li> <li>○ Digital Engagement: video-based diagnostics for self-repair and first-time fix</li> <li>○ Joining up data sets: using data from other sources to tackle illegal HMOs</li> <li>○ Optimising customer services: savings opportunities in delivering best practice customer service – improving the end-to-end service with technologies and tools.</li> </ul> </li> </ul>

Following the development of the Outline business case and the delivery of our partner report, it has been concluded that actually, nothing is out of the *potential* scope of this programme. We want to deliver improved customer service across the Council and to use this as a blueprint to continue to deliver change and improvement. For this reason, tranche 3 of this programme will be delivered as an agile programme. This is because we cannot fix everything in one go, what is being asked for is time, budget for a team and empowerment to work to the principles in the customer service strategy. It is recognised that we need to be adaptable to changes in what our customers need and to show benefits early, stop when something doesn't make sense and learn and iterate frequently. This will be a programme that:

- Reviews potential opportunities and applies a prioritisation matrix so that they are delivered in order of priority to the council to maximise benefits
- Delivers value at pace and at regular intervals, not waiting till the end of the programme.
- Makes the most of our internal talent, reduces our reliance on external consultants and enables us to learn and iterate

The research done as part of the strategic review has highlighted a number of projects that will go into this initial phase for prioritisation. These projects will develop our internal capability across a range of toolsets and develop confidence in delivery. A business case to continue into the second year of the strategy will be brought back in December 2022.

#### **Out of Scope**

- System procurement and 3<sup>rd</sup> party costs that might be incurred. Separate business cases will need to be presented where this is required. We have made assumptions that we have the integrations, and platform capability to deliver much of the work, but where we do not, we will request separate investment, pending its' value to the Council.

## 2 Section B – Strategic Case

This sets out the case for change and the project's fit to the Council Plan objectives

### 2.1 B1 - Programme Investment Objectives and Outcomes

The investment objectives and outcomes for this programme are to deliver the Customer Service Strategy 2022-2026 which can be summarised as follows:

Objectives	Outcomes
<ul style="list-style-type: none"><li>Improve the experience our customers receive when contacting the Council through all channels (effectiveness).</li></ul>	<ul style="list-style-type: none"><li>Reduced contact points, reduced failure demand, improved customer satisfaction</li></ul>
<ul style="list-style-type: none"><li>Train our staff to put the customer at the centre of everything we do</li></ul>	<ul style="list-style-type: none"><li>Increased customer satisfaction, reduced complaints</li></ul>
<ul style="list-style-type: none"><li>Develop our capability to deliver service improvement without the need for external help.</li></ul>	<ul style="list-style-type: none"><li>Reduced cost of contractors</li></ul>
<ul style="list-style-type: none"><li>A plan for delivering continuous improvements into the future</li></ul>	<ul style="list-style-type: none"><li>Ongoing service improvements are part of our everyday work</li></ul>
<ul style="list-style-type: none"><li>Improved metrics and performance analysis</li></ul>	<ul style="list-style-type: none"><li>Better insight, able to target support to areas where the biggest impact can be made</li></ul>
<ul style="list-style-type: none"><li>Customer panel established to help us research, test and validate our services</li></ul>	<ul style="list-style-type: none"><li>Services are designed better to meet needs</li></ul>

Outcome measures will need to be tailored depending on the service going in for transformation, but it is expected these will be in line with the Government Digital Service Standard i.e.:

- Cost to serve (call volumes, staff involved in delivery, etc)
- Digital take up
- Completion rate (demand caused by failure in the service)
- Customer Satisfaction

The outcomes for this programme are directly related to our Customer Service Strategy which was developed with customers, members and other stakeholders. The improvements in this programme are what they have asked us to deliver.

### 2.2 B2 - Programme Deliverables

The Programme deliverables at a high-level link directly to the Customer Service Strategy and are summarised in the table below.

Commitment	Timeline	Delivery Approach
A Customer Focussed Council		
<b>Our contract with you</b> We will develop a customer charter, setting out the	May 2022	Using the existing Citizen Involvement team panels, the programme will develop a co-produced charter using best practise examples from other local authorities and

Commitment	Timeline	Delivery Approach
customer service standards you can expect from us.		tailoring to our diverse community needs. This will be an activity managed in the change and release team.
<b>Communicating change</b> We will launch an annual customer services communications plan	January 2022	Using the existing Citizen Involvement team panels, developing the current Customer Service communications plan so that the Council and Customers will have a clear plan of when communication to our customers takes place during the year. This will be developed as an activity within the Change team.
<b>Owning customer service</b> We will ensure that all 11,000 of our staff have completed customer centricity training	December 2022	Collaborating with the Organisational Development team colleagues to develop a complete training for existing and new colleagues to ensure we can demonstrate we put customers at the heart of everything we do. This will be delivered by the New Ways of Working Programme.
<b>Giving you a voice</b> We will launch customer service panels, for citizens, young people etc	August 2022	Working with the Citizen Involvement team we will identify a Customer Service Programme Citizen panel for customers visitors, and business to be involved in service design and delivery that reflects our diverse communities. BAU activity monitored by the programme
<b>Testing our services</b> We will recruit and launch our first mystery shopping teams	August 2022	Working with the Citizen Involvement team to identify a group of citizens, that can test our services on all access channels. BAU activity monitored by the programme.
<b>Understanding you</b> We will use publicly available data sets to really understand the make-up of those in Birmingham and use this information to help shape our services	December 2022	Using the newly available Census 2021 data and other accurate datasets to ensure we test ourselves to ensure our services understand our customers and reflect the communities we serve. This work will be monitored on the programme but will be a BAU activity.
<b>A Connected Council</b>		

Commitment	Timeline	Delivery Approach
<b>Getting our information right</b> We will review and update information and materials we provide about our services on our website	September 2022	Delivery Team 1 will develop a training plan for content authors across the council and correct highly visible content.
<b>Speeding up your frequent tasks</b> We will identify the top 50 service requests and prioritise digitising them, with many available online	August 2022	Analysing current usage, the programme will prioritise service requests to ensure we maximise the offer to customers based on usage. The design and discovery team will work with service areas to ensure these are prioritised effectively.
<b>Helping you stay on top of things</b> We will be able to send you simple reminders for your appointments	June 2022	Exploiting our existing technology toolset to ensure we can prioritise reminders for appointments to make life easier for our customers. This work will be completed in delivery team 2.
<b>A Smarter Council</b>		
<b>Redesign our customer service set up</b> We will create a new team to provide earlier support and intervention, bringing together the parts of the council providing the top 50 targeted and specialist services	January 2023	Analysing the complete customer journeys of the top 50 services to provide a seamless service for the customer with a focus on early intervention. This will be completed by our design and discovery team.
<b>One view of you</b> We will develop our single view of you, sharing data safely and securely across the top 10 service areas.	December 2022	Analysing the top 10 services and areas to understand, design and develop the associated capabilities of sharing the datasets in a lawful and sensitive way to make our customers lives easier. This will be completed by our design and discovery team.
<b>Keeping you informed</b> We will identify the top 5 activities you would like to know about in your area (e.g., planned roadworks) and trial	December 2022	Analysing the top 5 activities prioritised by customers to allow customers to be updated in a proactive way, removing the requirement for customers to contact us. This will be delivered in Delivery team 2.



Commitment	Timeline	Delivery Approach
pre-emptively tell you, by text or email		
<b>A Connected city</b>		
<b>Signposting for you</b> We will identify the top 50 non-council service requests and ensure we prioritise and signpost to them on our website	March 2022	Working in collaboration with our colleagues, partners and community stakeholders identifying the services provided to ensure the non-council offer is clearly visible on the website.
<b>Easy searching</b> We will improve search capabilities on our website, so it is easy to find the right service provider for your needs	March 2022	This will be completed by delivery team 1.
<b>Asking you to help out</b> We will trial using digital technologies with a first cohort of 10 citizens, linking them to family and friends who can help out with their care	January 2023	The programme will identify citizens that can be part of an initial trial of using technology to meet their care needs with a greater involvement of the community. This work will be done by the design and discovery team.

This is an agile programme, therefore the products delivered will need to be scheduled once our designs are more fully formed, roadmaps will be communicated regularly but need to be adaptive and delivering the highest priorities. The initial pipeline of work has been formed following work done by our partner in the strategy formation stages. These are:

- Smart communications: chatbots and automation to handle enquiries
- Internet of things – devices and sensors to predict damp in properties
- Robotic process automation: reminders, data entry
- Pre-emptive demand: renewals and reminders for garden waste
- Customer journey automation: automating pest control and retail markets licencing
- Digital Engagement: video-based diagnostics for self-repair and first-time fix
- Joining up data sets: using data from other sources to tackle illegal HMOs
- Optimising customer services: savings opportunities in delivering best practice customer service – improving the end-to-end service with technologies and tools.

### 2.3 B3 - Programme Benefits

This programme will deliver benefits in improving the service. The benefits will be delivered in iterative chunks in co-production with the service areas. The programme also has a total cashable savings target of £10.7m over the 4 year period 22/23 to 25/26. To date approximately £5.9m worth of recurring savings opportunities have been identified with £1.7m of this now validated and ready to be progressed to delivery stage with the remainder requiring further validation work.

Benefit	Impact	Measure
<b>Benefits already underway from tranche 2</b>		
<b>Reduced calls, emails, and face-to-face contact</b> through implementation of webchat	Greater self-service online as webchat facilitates customer requests rather than customers having to call Contact Centre	Improved channel shift to digital solutions
<b>Reduction in number of telephone numbers</b>	Improved call routing and navigation increasing the likelihood of the customer speaking to the right team at the first time of trying	Increased customer satisfaction
<b>Reduce 131 postal addresses</b> resulting in channel shift to web forms	Channel shift to digital forms, which are more reliable and provide better results for the customer	Increased customer satisfaction
<b>Reduce 151 email addresses</b> making it easier for customer navigation	Channel shift to digital forms, which are more reliable and provide better results for the customer due to the structured format required	Increased customer satisfaction Improved contact resolution times
<b>Convert 85 PDF word document</b> into e-forms improving data capture and efficiency	Customers can self-service online rather than must fill out PDF/ paper form	Reduced number of PDF forms/ forms that require manual rekeying Improved response times
<b>Benefits to be delivered in tranche 3</b>		
<b>Improved customer satisfaction:</b> by adopting our strategic principles and leveraging new technologies to handle customer contact	Happier Birmingham City Council customers can lead more fulfilling lives thanks to a council that cares	CSAT scores Complaints
<b>Reduced budget requirements</b> by adopting a customer-centric delivery model backed by technology	Increased annual savings by year 4 through this enhanced business case.	Revenue costs to deliver services as per Financial Case in EBC
<b>Increased channel shift</b> to online services by developing fit for purpose solutions that make it easy	Customers who can access council services online leaving agents with more time to handle complex enquiries	Contact handling reports
<b>Reduced demand for calls</b> as services are brought online, allowing agents to spend more time with those who need extra help	Customers who can access council services online, leaving agents with more time to handle complex enquiries	Call volume reports
<b>Improved information, advice, guidance</b> and targeted approach to customer circumstances	Reduced failure demand for services through increased early interventions	Reduction in number of repeat requests from customers
<b>Automating appointment reminders</b>	Helping customers to manage their time and receive the help they need in a timely manner.	Reduced missed appointments
<b>Automating application processes</b> through robotic process automation	Reduced time to assess customer applications before approval, often providing support more quickly when needed.	Application processing times is improved.

## 2.4 B4 - Social Value Outcomes

- Improved perception of the Council's services
- Citizens will find it easier to transact with us and will experience reduced frustration
- Creation of new roles in agile customer centric delivery will present opportunities for our own workforce and add value to the wider system

## 2.5 B5 - Stakeholders

Engagement has been thorough, engaging different peer groups for challenge and feedback, including:

Customers and Communities  
Elected Members  
Corporate Leadership Team and Extended Leadership Team  
Colleagues  
Customer Service Programme Board  
Internal Partners and business units

In addition to the above, formal feedback on the Customer Service Strategy has been sought from residents and businesses. There has also been an independent user experience review conducted. The programme is also setting up a citizens panel that will inform future service design and be an integral part of implementing the Customer Service Strategy. Further detail on the feedback on the engagement is detailed in Appendix B.

## 2.6 Other organisational strategies and programmes

The Customer Service Programme has links, dependencies and overlaps with a range of existing strategies. From a philosophical perspective, the council is here to serve our citizens, and as such, all strategies should be centred around citizens.

Notwithstanding, some of the critical strategies worth highlighting due to the level of overlap or dependency are listed below. Note: a complete list of the strategies that have been reviewed in detail can be found in **Error! Reference source not found..**

**Figure 2 – key Dependencies and Overlaps**

Key Council Strategies	Why is it important?
<b>ICT and Digital Strategy</b>	Digital channels are a key way for customers to interact with the Council. The customer services programme and digital strategy team are jointly working on the development of the digital strategy. The provision of services to residents is wholly dependent on sound technology. It is only through integrated systems, clean and up-to-date data that we can serve our residents well.
<b>Digital City</b>	Similar activities and shared challenges with Birmingham's Digital City ensure the most vulnerable and excluded citizens have better access to online and face-to-face services.
<b>Workforce Strategy</b>	We have committed that every staff member will be provided refresher training in customer- centricity by 2022, and we have the ambition to

Key Council Strategies	Why is it important?
	<p>put customers at the heart of everything. The training is already a key item in our workforce strategy.</p> <p>The Council are also committed to agile and digital working, offering flexible arrangements that work for our employees.</p> <p>Finally, as a council, we are moving away from actions to outcomes, making sure that we have a high performance, empowered workforce able to deliver results that matter</p>

### 3 Section C - Economic Case and Options Appraisal

This section sets out the options that have been considered to determine the best value for money in achieving the Council's priorities

#### 3.1 C1 - Summary of options reviewed at OBC stage

The economic case for the Customer Service Programme was previously considered at the OBC stage. The following options were considered, and the Programme Board concluded that the preferred and recommended way forward is **Option 3 – full-scope programme**. No material changes have occurred at the EBC stage. The summary is provided below:

Option	Advantages	Disadvantages	Selection/ Dismissal
1) 'Do nothing' - Maintain division of responsibility across directorates, deliver BRUM account /improvement to complaints as discreet projects.	Limited impact on current staffing arrangements. No investment risk	Will not deliver the extent of our vision for customer service. Limit's opportunities to improve the customer experience and deliver savings. Council is in a position whereby savings need to be made.	Dismissed. Suboptimal delivery of the Customer Service vision and improvements to the customer experience.
2) Partial Scope Programme - Coordinate centralised activity under a programme structure and work with selected directorates.	Greater coordination and joined up working of in-flight projects.	Whilst selected improvements could be made, services would remain inconsistent, and opportunities to maximise efficiency would be missed Increased total cost of ownership due to fragmented delivery.	Dismissed. Services would continue to be inconsistent.
3) Full Scope Programme – Include the whole service catalogue across all directorates within scope, prioritise, and phase delivery whilst delivering the outputs using an agile programme methodology	Whilst significant in scope, ambitions can be realised through effective phasing and sequencing of activity. By addressing customer service across the council, we can offer a consistent and excellent customer experience.	Greater investment required. Greater level of change management required.	Recommended option. A phased approach provides better management of costs and associated delivery by reducing the risk of change fatigue and negative impact on performance at a time of reduced capacity across the organisation. Only by addressing customer service across the council can we offer a consistent and excellent customer experience.

**Improved customer experience:** services to be measured through mystery shopping (as the customer measure the process when it went LIVE, they can confirm if it is at the same standard).

**Consistent performance collection of customer metrics across services that have been through the improvement process:** joined-up systems and processes to ensure performance data is measured consistently and root cause analysis is completed and acted on.

**Achievement of the savings at Year 2 of the strategy.** This EBC is only looking at a delivery team for 1 year and will bring back further business cases to deliver additional savings.

**Management of contact in a structured way for services reviewed as part of the Customer Journey improvement:** allows teams to utilise similar technology, adopt consistent standards and leverage investments to customer teams in a consistent manner.

**Embedding Customer Experience and Knowledge as part of the DMT performance reviews/ forward planning:** for services that have been reviewed the Service Managers will be supported to develop a service level visual that will be owned and maintained by each area. Typical data points for inclusions will be:

- Customer segmentation, customer journey identification, access channel breakdown, future technology, advertising and seasonal resources forward plans.

**Reduced costs for service delivery:** for services reviewed as part of the Customer Journey improvement, will see reduced costs of service delivery and improved performance and customer satisfaction.

**Drive performance:** towards the delivery of the Councils Delivery Plan outcomes of:

- Using innovative technology and processes to support making Birmingham an aspirational city to grow up and live in.
- Optimising services to support making Birmingham a great city to live in.
- Focusing our resources on the people that need it most, making Birmingham a fulfilling city to age well in.

**Benefits optimisation,** the programme via the Customer Journey improvement activity will:

- Optimise service delivery to achieve savings to be reinvested in the programme.
- Increase customer self-serve opportunities and usage resulting in resource savings.
- Decrease failure demand, resulting in less resources required to support services.
- Enable the Council to focus resources on the people that need it most.
- Reduce the number of handoffs in service delivery, increasing efficiency of the processes.
- Where applicable centralise, digitise and automate transactions to reduce cost per transactions and enable focusing of resources on where they are needed most.

To support the achievability of Customer Centricity the programme will:

- Effective engagement and governance will ensure the success of leadership, stakeholder and partner contributions.
- Effective collaborations with Organisational Development team and Agile Liaison Officers to support the Customer at the heart of everything we do on a team basis understanding the current and future positions with a roadmap to ensure timely delivery and check points.

## 3.2 C2 – Critical Success Factors

### 3.3 C3 Key performance indicators

The following key performance indicators will help measure the Council's overall performance against the programme's objectives.

**Figure 2 – Performance Framework**

Objective	Suggested KPIs
We will put customers at the heart of everything we do	First-time resolution for customers Reduce failure demand (difficult to measure) Improved customer satisfaction Minimise the cost of customer interaction Appropriate channel mix depending on the service user's needs (N.B., we must support vulnerable users, not just the digitally literate). Mystery shopping results (using satisfaction scores).
We will use insight to inform how we best serve our customers:	E.g., Analytics like task completion rates, time taken, drop out points, dropout rates, usability, user comprehension and satisfaction Usability testing.
We will make digital the channel of choice whilst maintaining alternative channels for the most vulnerable	Customer transactions by channel Appropriate channel mix depending on the service user's needs (N.B., we must support vulnerable users, not just the digitally literate). Usability testing results.
We will be transparent about our service standards and our performance against them	Customer Services Strategy Agreed set of consistent service standards Dashboard of performance developed including all key services.
We will innovate to improve efficiency and effectiveness.	Reduction in back-office costs through delivery of business improvement projects Reduction in failure demand and repeat contact.

### 3.4 C4 Preferred option

The preferred and agreed option at the EBC stage is as follows: Option 3: Full Scope Programme – Include the whole service catalogue across all directorates within scope, prioritise and phase delivery whilst delivering the output. As this programme is following an Agile methodology this EBC is stating the overall strategy but only requesting funding for one year. The business case to continue after one year will be brought back with real life examples of delivery.

### 3.5 Key findings

The work done with our partner identified that delivering this programme will deliver savings to the Council. The case studies identified the following potential deliverables to work on and these will form the initial pipeline of cases into the delivery teams to work on. Please note that all identified savings will need to validate in the co-production discovery phase with the business leads. Those with a green status will be put into the programme pipeline for Year 1.

**Table: key findings from the 8 Capability areas assessed by our partner**

Capability Area	Benefit Description	Service Area	Savings	RAG	Update
Smart Communications	Chat bots and other automated communications to handle customer enquiries	Contact Centre	£400,000		Savings agreed in writing with the service.
Internet of Things	IoT for sensing damp across housing	Housing	£792,444		Further investigation is required with the service to understand the constraints in more detail.
Robotic Process Automation	Automating appointment reminders + post assessment data entry double keying	Bereavement Service	£1,000,000		Savings agreed with the service.
Pre-emptive demand	Renewals and reminders for collections of garden waste.	Waste Service	£87,349		Savings agreed with the service.
Customer Journey Automation	Automating Pest Control and Retail Markets Licensing	Licensing Service	£200,000		Savings agreed with the service.
Digital Engagement	Video based diagnostics, self-repair and first time fix etc.	Housing Repairs	£1,000,000		Further investigation is required with the service to understand the constraints in more detail.
Joining up data sets	Using data from other systems to tackle illegal HMOs in Birmingham	Licensing Service	£1,495,000		Further investigation is required with the service to understand the constraints in more detail.
Optimising Customer Services	Individual savings opportunities centred around utilising best practice customer service practices, technologies and tools.	Registrars, Street Cleaning, Waste – Commercial/Clinical, Libraries and Planning.	£ 929,496		Further investigation is required with the service to understand the constraints in more detail.
Total			£5,904,289	*(£ 1,687,349) for the savings with a Green RAG status)	



### 3.6 C3 - Risks and Issues

Please outline your top risks and issues as per the implementation of your preferred option

No.	Description	Impact	Mitigation
R6	There is a risk around funds and that some workstreams may require further investment to deliver against all requirements	High	Preventative: Continuous discussion for projects that overlap/ dependencies with other programmes such as the Insight Board. Funding arrangements to be set out in advance as part of the council's financial plan. Responsive: Impact assessment and reviews to be carried out to determine an appropriate response, decision and source of funding if deemed essential.
R10	There is a risk that services' lack buy-in and engagement to adopt the strategy and that new processes will not realise benefits in line with the programme's aims.	High	Service commitment to providing an appropriate level of internal resources to support work across all services in-scope for redesign will be sought. A detailed time-based resource plan will be provided in support of this request. Corporate Governance has been established via the Customer Service Programme Board.
R11	There is a risk that cashable savings will be absorbed as service efficiencies if they are not clearly defined for each programme area.	High	The cashable savings which must be attributed to the programme are detailed in the existing the eight MVP Business Cases. A status breakdown per business case and service commitment is provided in section 3.4.1
R13	There is a risk that an appropriate level of resources will not be dedicated to the programme resulting in it being unable to deliver at pace or with the necessary momentum.	High	The programme has set aside specific budgets to second staff over to the programme and support with delivery. Backfill arrangements shall be confirmed. Regular monthly meetings held with FBP updating on spend to date and forecast for remainder of financial year and programme lifespan.

## **4 Section D – Commercial Case**

Due to the agile nature of the programme, we have predicted all commercial possibilities as far as we can reasonably tell at this time.

### **4.1 D1 - Partnership, Joint venture and accountable body working**

*Describe how the project will be controlled, managed and delivered if using these arrangements*

N/A, This programme will be delivered by our own talent. We will use existing frameworks to augment our teams with specialist support only when it is required.

### **4.2 D2 - Procurement implications and Contract Strategy**

Where possible, the Council will seek fixed price work packages to compare the value from the external supplier and in-house resources in terms of (costs, delivery time scales and risk etc.). We aim to maximise the impact of each pound spent (maximise value for money) and improve people's lives, taking a more holistic approach than considering costs without the wider context.

### **4.3 D3 - Staffing and TUPE implications**

Implementation of this way of working will require the definition of new roles to enable us to embody the strategy in our day to day work. The Customer Service Programme will work closely with HR to shape what and how we deliver to ensure that it is helping to build the culture that BCC seeks to achieve (e.g., customer centricity is a cultural objective that impacts every area of the council).

No TUPE Implications have been identified in this first phase of the Programme. HR will be part of the discovery and design team and so will be sighted early on any potential projects that would have such an impact.

## 5 Section E – Financial Case

The following Section sets out the costs and benefits (financial case) and the stages that have already been delivered to ensure affordability and deliverability of the savings and costs within this enhanced business case.

### Ensuring Robustness of the EBC

The EBC builds on the initial estimates, costs, and benefits of the OBC previously developed. During the tranche 1, a series of MVP Business Cases were developed alongside our independent delivery partner. The principles are non-negotiable; however, the customer centred approach has been pragmatically applied with the services and challenge sessions held with the business areas to ensure robustness. The business cases have also been reviewed and challenged by the council Finance Business Partner to ensure assumptions, models, and the overall business case is sound and considered to ensure no duplication of savings.

There will likely be some areas where savings and costs vary from the business cases during the programme's implementation. This is common as detailed implementation will reveal new information that will affect the design and implementation of relevant projects and solutions.

There is a benefits realisation resource allowed for in the plan to help manage these situations, and it is expected that overall, these additions and reductions will balance out. There is a change control process (Management Case) to identify, track and measure these.

Delivering an agile, pragmatic and affordable programme that is set to provide realistic and achievable savings has been identified as being of paramount importance in discussions with budget holders. The original OBC sought £0.800m in funds to discover more about how we serve our customers today and “fix the basics” expected of any council. To date approximately £0.754m has been spent as detailed below. Our successful delivery of projects in tranches 1 and 2 demonstrate the capabilities of the Customer Service Programme to drive tangible benefits to our customers.

**Figure 3 – Status of Previous Funding Requests**

Status	Project	Activity description	Total investment request (£M)
<b>Tranche 1</b>			
<b>Completed</b>	Discovery Phase (complete)	Resources to complete discovery phase for Customer Service programme	0.261
<b>Completed</b>	Programme Resource (complete)	Programme Team stand up and resource onboarding before commencement in April	0.048
<b>Green On-track</b>	Web Compliance	Onboarding of Project Manager and Web Support Team	0.017
<b>Green On-track</b>	BRUM Account Phase 3 (ongoing as planned)	Onboarding of Project Manager and Support Team	0.031
<b>Tranche 2</b>			
<b>Completed</b>	Delivery Phase of Customer Journey Improvement Project (complete)	Onboarding of Project Manager and Support Team	0.041
<b>Green On-track</b>	Extension costs	Programme team to support the engagement process of the Customer Service Strategy, development of the EBC and implementation programme plan for the Customer Service Programme.	0.031
<b>Green On-track</b>	Tranche 2	Delivery of tranche 2 activity	0.325
<b>Tranche 1 and 2: on track for completion by 30 November 2021 as per plan</b>			<b>£0.754</b>

In addition the above, the Council also invested £1.335m to improve the systems and processes for the management of customer complaints and member enquiries. With a strong foundation, we are now well-positioned to raise the standards of customer service, which we will do by improving our customer service capabilities, investing in technologies through our digital strategy, and changing our delivery models to be more proactive than reactive.

## 5.1 E1 Funding Request

This request is for tranche 3 (January 2022 – January 2023).

## 5.2 Funding Request Tranche 3

The Customer Service programme has been allocated funding of £5.6m from financial year 2019/20 (note this has been carried forward to financial year 20/21). The programme is now requesting permission to draw down a portion of the funding of £1.7m to continue our successes by implementing a range of enterprise-wide initiatives. We have endeavoured to keep the programme costs as low as possible, but have allowed for backfill in order to maintain hectic BAU delivery in customer services and IT& D. This represents a cost avoidance of approximately £600K Using this approach, we remain flexible to Council Leadership ambitions and request from services to be engaged.

The following table breaks down the investment requirements and estimated savings for each category of spend:

**Figure 4 – Investment requirements and estimated savings**

Project	Delivery Team	Cost (£)	Full Year Savings (£)	22/23	23/24	24/25	25/26
Smart Communications	1	340,115	400,000	-	-	50,000	400,000
RPA - Bereavement	3	928,483	1,000,000	250,000	750,000	1,000,000	1,000,000
Pre-emptive Demand - Green Waste	2	422,911	87,349	40,000	87,349	87,349	87,349
Automation -Markets	2		100,000	50,000	100,000	100,000	100,000
Automation - Pest Control	2		100,000	50,000	100,000	100,000	100,000
<b>Total</b>		<b>1,691,508</b>	<b>1,687,349</b>	<b>390,000</b>	<b>1,037,349</b>	<b>1,337,349</b>	<b>1,687,349</b>

Note: the IoT sensors and the video repairs calls opportunities will not be picked up by this programme in year 1, they may potentially be picked up by the Housing Programme using the blueprint/method this programme defines or be part of the business case for year 2 funding.

## 5.3 Sensitivity Analysis

While many of the savings estimated are already conservative, if we took a very pessimistic view that only 50% of the savings are generated, the business case remains strong with a break-even point in the second half of 23/24, with annual net savings running at £2.2m p.a. from 24/25. This is excluding any further savings from Fixing the Basics or that come as a result of the Lean reviews.

Please note that no savings have been attributed to the discovery and design reviews, implementation of further use-cases once the initial 'proof of capabilities' have been proven or for the fixing the basics. All of these should be expected to deliver further savings to the programme.

The programme is structured to begin realising benefits from 2022 to mitigate the longer-term strategic projects that require more time before a return on investment is realised. During this time, there is potential for further opportunities to be identified that capitalise on these new investments into Customer Services, leading to additional savings being realised, using the user centred design approach and governance to oversee and deliver stretch targets.

## 5.4 Setting the cost estimate and benefit target

The cost estimates for tranche 3 have been based on are robust in that they are based on the costs of people to be assigned to the programme for a specified period of time.

Benefits and return-on-investment have been calculated using average to worst-case scenarios. Underlying data sets use BCC data, supported by benchmarking comparisons to estimate the potential for

improvement and then tested with services to ensure feasibility. The savings will be validated as the opportunity goes through the design process with the multi-disciplinary team.

### 5.5 Financial Benefit Realisation

Realising the financial benefits is critical to the overall programme and is recognised as one of the Programmes Critical Success Criteria. The following is a summary of the Financial Benefits Realisation controls, which are in line with Birmingham's approved benefits realisation management tool. **Please see Error! Reference source not found. for further detail.**

**Figure 5 – Financial Benefits Realisation Controls**

Stage	Strategy
Define Financial Benefits	Start with high-level savings opportunities Agree general direction and opportunities with senior stakeholders Define based on available metrics in the discovery and design team Use benchmark data where metrics are not available Set SMART targets to identify savings that are specific, measurable, attainable, relevant and time framed
Develop	Develop OBC based on available data or use benchmark data were not available Develop series of one-page business cases Design and discovery team review the opportunity and create a to be service design with the business leads and enabling service experts where appropriate
Validate	Validate savings from the co-produced service design-with Services and Finance leads and CPMO
Manage	Finance lead assigned to the programme to record benefits at post implementation review Manage benefits at all Programme Boards Communicate savings to CPMO and regular challenge sessions
Control	Use benefits tracker for daily, weekly, monthly monitoring Use risk log to manage risks that could impact benefits Stop projects that will not deliver savings, prioritise projects that deliver maximum value

### 5.6 E2 - Overall affordability

As with all investments, the council needs to consider whether it has the financial capacity to invest in this programme and if this investment stacks up against other investments. All of this is happening at a time when many residents and businesses are dealing with difficult personal and financial situations.

This EBC outlines a series of improvements that transform customer experiences and aim to fix many of the broken experiences that our residents face day-to-day when contacting the council or trying to use services.

This EBC will improve access to critical services at a time when our residents need it most, improving the relationship between residents and the council by making it easier to access services. The investment will reduce the yearly budget or cost avoidance for delivering in-scope services as highlighted above.

The cost of tranche 3 for the Customer Service Programme is £1.7 m1 which excludes the cost of any ICT Hardware/software deployment which will be addressed as part of the automation and customer journey improvement programme. The funds will be a draw down from the original £5.6m that was allocated to the Customer Service programme in 2019.

Further work will also need to be carried out to identify the additional savings of over £4.8m that is required to meet the total programme target of £10.7m over the next 4 years and the investment required to do this will need to be approved in due course.

<sup>1</sup> This includes training costs that can be refunded through capital receipts

**Schedule/ plan tolerance:** Note all individual projects will be planned in more detail and agreed on a project-by-project basis. Once in delivery, projects will be timebound and will need to adjust scope or request time for a further sprint with the delivery team to complete scope via the operational sponsor.

This approach largely fixes costs on this programme, the programme will need to ensure that only those projects that deliver value are worked upon.

### **5.7 E3 – Approach to Optimism Bias and Provision of Contingency**

Costs, savings and returns on investment represented in this business case are based on average or worst-case scenarios to ensure benefit aspirations remain achievable, and the business case remains deliverable even if circumstances change. For example, external case studies from across the sector has shown financial returns from chatbots of around 20% are achievable; however, we have based the business case on a conservative 5%. The programme benefits officer will review this during the project's life to ensure that those benefits are realistic and achievable and that any benefits that might accrue are not lost due to lower and more risk-averse initial estimates.

The cost savings for the MVP Business Case development has been tested with services to determine the feasibility of realising the actual savings during the timeframe of the Customer Service Programme. These will need to be carefully managed to ensure any detailed design activity or savings with limited resource from the service to support the delivery are clearly understood in advance.

The project has also based these estimates on previous experience of our independent third-party partners. They have significant experience in delivering these solutions and benefits in other like-for-like Local Authority settings.

The programme has factored in the risk of financial optimism bias. That said, the programme will continue to review risks and the business case, and if costs rise above the business case level or additional opportunities are identified, the programme will seek extra funding from the Portfolio level.

To mitigate risks of overspend, the programme will adopt a collaborative approach with regular meetings and communication with other directorates and services across the council. Effective risk management with mitigating actions identified and in advance and proactively managed is also critical to on-time and in-budget delivery.

As projects progress and more detailed design and implementation plans are developed, risks will naturally decrease as specialist project staff are recruited. Therefore, the riskiest points of the project are likely to be in the initial phases and if the programme doesn't adequately take account of project slippage. As this programme is an agile programme, control on projects will be exercised by making them time bound. This means that the business owner will need to flex the scope to come in within the timescale. If the scope does not meet the benefits the programme will need to make a decision whether to allow further time to add more value and push back other products, or whether to accept a reduced value.

### **5.8 Tolerances**

Tolerances are an effective way to delegate board or Sponsor responsibilities for small adjustments that might be needed from time to time in the delivery of the project. They ensure the pace and cadence of the project are not disrupted by the untimely occurrences of the next programme or project board. However, they do not negate the need for reporting changes and risks.

On this programme, the board grants the following tolerances to Programme Theme owners:

### **5.9 E4 – Taxation**

There are no VAT or other tax implications in relation to this project. The VAT Managers Janet Morritt and Jan Hulley will be engaged on all VAT related matters on the Customer Service Programme.

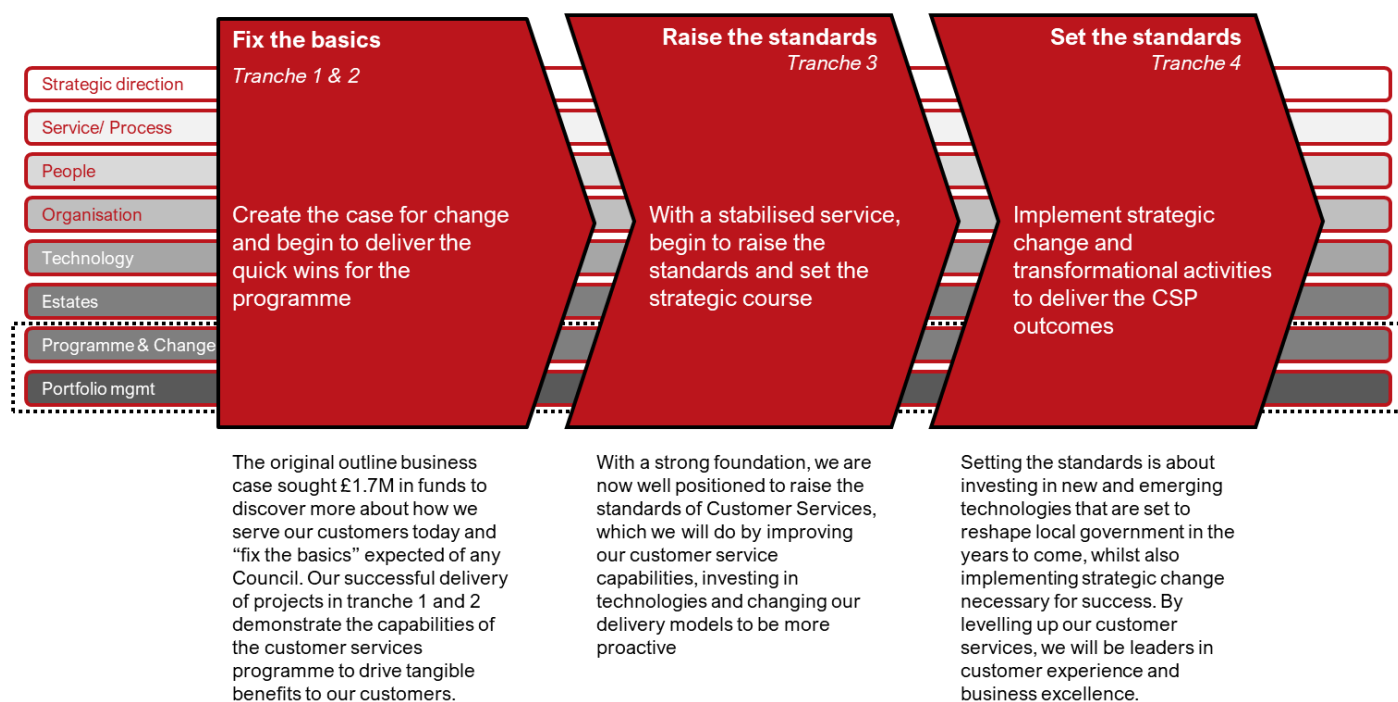
## 6 Section F – Management Case

This section considers how robust your programme delivery plans and arrangements are

### 6.1 F1 - Programme management arrangements

The Customer Service Programme is an integral part of the Fit for Purpose Council Portfolio, which comprises several programmes aligned to the Delivery Plan. The portfolio management function exists to understand and implement how the Council will transform in the short and medium-term, supporting its progressive vision. The Programme has been split into three tranches, with tranches 1 & 2 already having been delivered. The diagram below illustrates.

Figure 6 – Programme Tranches

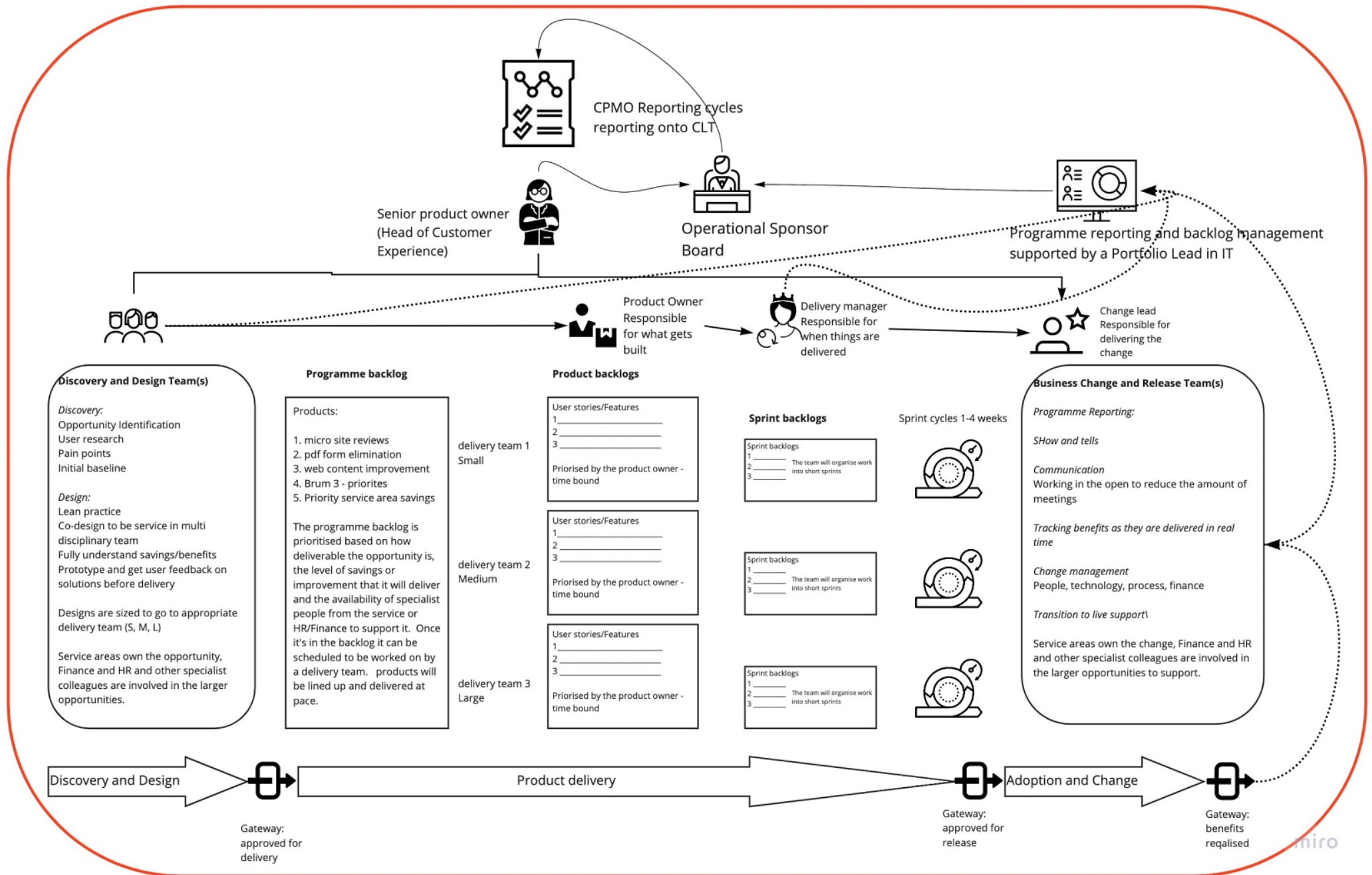


### 6.2 Programme reporting structure

The reporting organisation and the reporting structure for the project are shown in figure 7 overleaf:



**Figure 7: High level Customer Programme Structure**

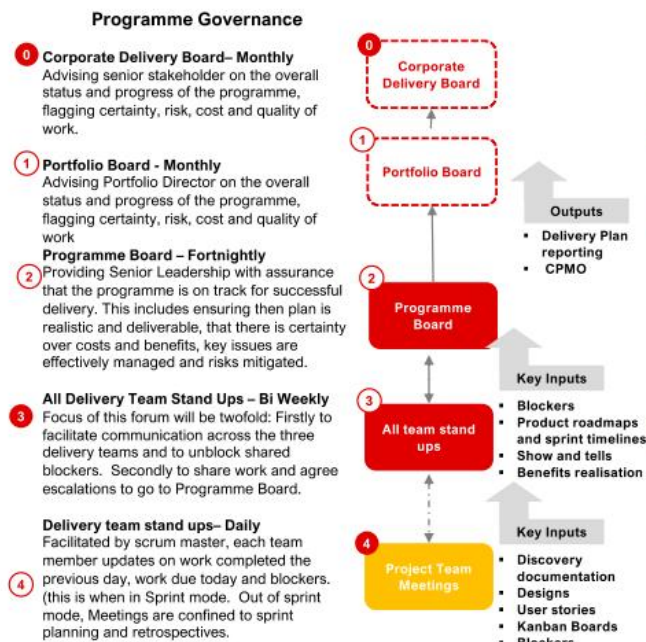




## 6.3 Programme roles and responsibilities

Figure 8: Programme Governance

# Programme Governance



Programme Leadership	
Programme Sponsor	Senior Product Owner
Peter Bishop/Wendy Griffiths	Geraldine Collins
<ul style="list-style-type: none"> <li>Promotes, advocates and shapes the Programme;</li> <li>Chairs the Programme Board to provide oversight and advice.</li> </ul>	<ul style="list-style-type: none"> <li>Responsible for prioritising the work of the delivery teams.</li> <li>Leading the change management activities</li> </ul>
Portfolio Lead	Delivery Manager
<ul style="list-style-type: none"> <li>Reporting</li> </ul>	<ul style="list-style-type: none"> <li>Facilitation, timeboxing</li> </ul>

Key Stakeholders	
Programme Board attendees	
Stakeholder	Responsibility
Business Leads	<ul style="list-style-type: none"> <li>Provides review and challenge from a business perspective, including business feedback on improvements.</li> <li>Informed of ongoing progress, providing input</li> </ul>
Finance	<ul style="list-style-type: none"> <li>Updated on progress, providing advice on the assurance of programme outcomes</li> </ul>
HR	<ul style="list-style-type: none"> <li>Providing change support where required</li> </ul>
Programme Board reporting	
Stakeholder	Responsibility
Sponsor	<ul style="list-style-type: none"> <li>Informed of progress against programme plan and Delivery Plan, providing strategic direction and challenge.</li> </ul>
Portfolio Director	<ul style="list-style-type: none"> <li>Informed of progress against programme plan and Delivery plan, providing direction and challenge from a portfolio perspective</li> </ul>
CPMO	<ul style="list-style-type: none"> <li>Updated on progress, including specific Milestones/Accountabilities, providing advice on corporate alignment.</li> </ul>

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PAGE 1



## 6.4 Programme plan

The high-level plan for Tranche 3 of this programme is shown below in figure 11. The programme is an agile programme, all projects will be assessed within the design and discovery team and assigned to a delivery team depending on their size and complexity and will be scheduled in priority of the benefits they deliver to the Council. Roadmaps showing the projects in each phase of the programme will be produced on a regular basis to show stakeholders progress and how value is being delivered regularly.

Figure 9: High Level Plan



## 6.5 F3 - Use of special advisers

Specialist Area	Adviser
Financial	Lee Bickerton
Technical	Cheryl Doran
Procurement / Legal	N/A

## 6.6 F4 - Arrangements for change management

*The strategy, framework and plan for dealing with change management are as follows.....*

The change model for the Customer Service Programme will be aligned with the change model for the New Ways of working programme. Change will be managed on this programme by the change and release team as per the diagram for the high level programme reporting structure on page 34. Depending on the scale of the individual project being delivered, colleagues from HR will be engaged to help support that activity.

## 6.7 F5 - Arrangements for benefits realisation

*The strategy, framework and plan for dealing with the management and delivery of benefits are as follows.....*

As this programme is engaging services from all across the Council, the business lead for that service area will be responsible for delivering the benefits for their particular project. The expected benefits for each project will be assigned during the discovery and design phase. This phase is done as a multi-disciplinary team with the business lead fully engaged in that design. At the end of the change phase, a new baseline will be measured and benefits will be assigned to that business lead and the appropriate amendment made to budgets by the finance lead for the programme.

*A copy of the proposed project benefits register is to be found in Section G - Supporting Documents This sets out who is responsible for the delivery of specific benefits, how and when they will be delivered. As this is an agile programme, the benefits may be reprioritized depending on other opportunities coming in, or potential opportunities becoming undeliverable/needing to be stopped.*

## 6.8 F6 - Arrangements for risk management

*The strategy, framework and plan for dealing with the management of risk are as follows.....*

The programme will maintain a programme level RAID (Risks, Assumptions, Issues and Dependencies) log. Projects are being delivered in agile methodology and will manage issues and blockers on a daily basis through project stand ups. Blockers that will prevent delivery of project scopes within a sprint will be escalated to the Senior Product Owner and Operational Sponsor for immediate attention. It's vital that the operational sponsor is empowered to make decisions swiftly with the Senior product owner, business lead and product owner to keep momentum on projects.

*A copy of the programme level risk register is to be found in Section G - Supporting Documents*

## 6.9 F7 – Arrangements for dependency management

The Customer Service Programme has undertaken a review of overlaps and dependencies from key BCC strategies in the public domain. These dependencies and overlaps have been shared with Strategy Owners and Directorates.

The programme has also agreed on identifying critical dependencies from existing programmes undertaken with the Corporate Programme Management Office.

All dependencies will be captured on the RAID (Risks, Assumptions, Issues and Dependencies) log and managed at a programme level.

*A copy of the dependency log is to be found in Section G - Supporting Documents*

## 6.10 F8 – Arrangements for Impact assessments

The programme has completed a BCC Equality Impact Assessment inline with the standard approach.

*Copies of the impact assessments are to be found in Appendix D of this cabinet report – Equalities Impact Assessment.*

## 6.11 F9 - Arrangements for contract management

*The strategy, framework and plan for contract management are as follows.....*

At this stage, there are no contracts specifically to be managed by this programme directly.

## 6.12 F10 - Arrangements for post project evaluation

The arrangements for post implementation review (PIR) and project evaluation review (PER) have been established in accordance with best practice and are as follows:

Post project reviews will consist of a review of the post implementation review of the benefits along with project retrospectives. This will ensure that there is good sight of the effectiveness of the project on the organisation's baseline (service, costs) as well as the learning and development impacts on the people doing the deliveries on the programme (skills, attitude).

## 6.13 Post implementation review

This review ascertains whether the anticipated benefits have been delivered. The review is timed to take place one month after a product/project is put into live service.

Post implementation, a new baseline of measures will be taken against the original measures recorded in the discovery and design phase. A new baseline will be taken and the difference

- Corporate Leadership Team (CLT)
- Deputy Council Leader
- Corporate Clearance
- Cabinet
- Scrutiny.

discussed. Learning points will be reported to the programme board, project retrospective input will be included in the post implementation reviews.

#### **6.14 Project retrospective**

As each project is delivered, a retrospective will take place, it is usually timed to take place at the end of each sprint. In the retrospective, all delivery team members will record; what went well, what didn't go well, what they learned, and what they need to learn for the next project to improve. Agile project retrospectives are a great learning tool in that they focus on the people and the continuous improvement in and investment in skills.

#### **6.15 F11 - Gateway review arrangements**

This EBC has been through the following reviews:

- Sponsor
- Customer Service Programme Board
- DMT
- Corporate Programme Management Office

Further reviews are planned as follows:

#### **6.16 F12 - Contingency plans**

In the event that this project fails, the following arrangements are in place to guarantee the continued delivery of the required services and outputs:

No specific contingency plans are in place for services, as all services will continue to operate as is without the project. In the event a project is not going to deliver value, it will be stopped prior to a large amount of resource being expended on it. In this event, the programme will start work on the next project in the pipeline/backlog and the original project will undergo a review to understand why/if further research or change work could deliver benefits. If that is the case, it can go back in the programme backlog.

## 7 Section G – Supporting Information

### 7.1 G1 Equality Impact Assessment

This is completed under separate cover using the digital Birmingham City Council process.

### 7.2 G2 Risk Log

Figure 10 – Risk Log - November 2021 onwards

No.	Description	Impact	Mitigation
R1	There is a risk that leadership shall have programme fatigue given the scale of transformation work taking place across the BCC portfolio	Medium	All team members to contribute and support—all tiers of the organisation. As a group - everyone has a leadership role. Provide regular updates on Customer Service Programme. Make sure colleagues are clear on what they are doing and how they contribute
R2	There is a risk that any issues in delivering the Customer Service programme in this tranche could be seen as a negative pre-cursor for the remainder of the programme	Medium	Deliver holistically, trackable. Reflect on what customers are saying. What is going on and remind people why this is important
R3	There is a risk of reliance on contractors/consultants to deliver the changes identified by the programme post tranche 2, which are not yet/ will not be allocated in time to support tranche 3.	Medium	Build resilient team, in-house capabilities. Knowledge transfer Identify opportunities to leverage in house skills and capabilities throughout the programme
R4	There is a risk that the customer improvements identified in tranche three are limited to lack of integration with other programmes and projects to make the required changes across the organisation	Medium	Identify dependencies and gaps across programmes and develop an action plan to address these dependencies Impact assessment to identify issues and updated action plan to remedy the situation
R5	We are still to onboard some of the critical workstreams from which other workstreams shall be dependent on	Medium	Highlight key dependencies in the programme plan. Provide details to programme sponsor and CPMO
R6	There is a risk around funds and that some workstreams may require further financing to deliver against all requirements	High	Preventative: Continuous discussion for projects that overlap/ dependencies with other programmes such as the Insight Board. Funding arrangements to be set out in advance Responsive: Impact assessment and reviews to be carried out to determine an appropriate response, decision and source of funding if deemed essential
R7	There is a risk to working with suppliers, and timeframes, contractual arrangements and	Medium	Upfront agreement and work plan with suppliers to ensure everyone has clear expectations

	additional works may not match Birmingham's styles, needs or ways of working.		<p>Require specialist technical/ other knowledge to lead some aspects of conversations with suppliers</p> <p>Skills/ gap analysis and resourcing requirements for the programme</p> <p>Budget/ capacity to be flexible and support programme where required</p> <p>No single point of failure</p> <p>Handovers and sign off with assistance from the supplier</p>
R8	There is a risk the organisation's focus is not on the "customer first" as there are competing priorities that are also valid demands on Birmingham (e.g., financial requirements first, regulatory challenges and so on).	Medium	<p>Focus on good news stories around customers</p> <p>Recognise indirect benefit to customers by empowering other stakeholders, teams and employees</p> <p>Capturing and presenting the voice of the customer</p>
R9	There is a risk around customer perception, and how as an organisation, customers may not feel that BCC is acting in their interests based on individual experiences.	Medium	Projects are structured so that the voice of the customer is heard, and their requests are incorporated into the programme.
R10	There is a risk that services' lack buy-in and engagement to adopt the strategy and that new processes will not realise benefits in line with the programme's aims.	High	Service commitment to providing an appropriate level of internal resources to support work across all services in-scope for redesign will be sought. A detailed time-based resource plan will be provided in support of this request.
R11	There is a risk that cashable savings will be absorbed as service efficiencies if they are not clearly defined for each programme area	High	The cashable savings which must be attributed to the programme are detailed in the existing the eight MVP Business Cases which have been signed off by the service and finance leads. Governance in place at Programme and Portfolio level to ensure savings targets are reviewed and challenged regularly.
R12	There is a risk that the breadth of customer service is perceived to include only those services selected to feature in the initial programme scope. We will fail to embed customer-centric behaviours across the wider organisation.	Medium	The programme will work with the Organisational Development Team to ensure high-quality customer service is a collective responsibility.
R13	There is a risk that an appropriate level of resources will not be dedicated to the programme resulting in it being unable to deliver at pace or with the necessary momentum.	High	The programme has set aside specific budgets to second staff over to the programme and support with delivery.

### **7.3 G3 Customer Service Cost Model**

Cost, benefits and resourcing model for the customer service programme. Includes a status update for signed off cases.

### **7.4 Appendix 1 – Customer Service Strategy Engagement Feedback Appendix 2 – Section G Supporting Information**



Appendix B Customer Service  
Service Strategy Engagement Programme EBC Section



## 7.5 12.5 Appendix 2- Strategies and policy list

Accurate as of 8th of September 2021		STRATEGIES, POLICIES AND PLANS ALIGNMENT PROJECT: OVERVIEW				
#	WEB TITLE	STRATEGY DOCUMENT TITLE	RAG	STRATEGY EXPIRY DATE	LINK	SOURCE
1	ASC	Draft Commissioning Strategy	G		Draft Commissioning Strategy	
2	ASC	Domestic Abuse Prevention Strategy	G	2023	Domestic Abuse Prevention Strategy	BCCInternet
3	Children's	Improvement Plan for Early Help and Social Care 2015 to 2017	G		Early Help Improvement Plan for children's social care 2015 to 2017	BCCInternet
4	Children's	Early Help Strategy in Birmingham 2015-2017	G		Early Help Strategy in Birmingham 2015 to 2017	BCCInternet
5	Children's	School attendance and absence including code of conduct	G		School attendance and absence including code of conduct	BCCInternet
6	Children's	Children's Trust and support	G		Children's Trust	BCCInternet
7	Children's	Pupil Attendance Strategy	G		Pupil Attendance Strategy	BCCInternet
8	Children's	Support for Families - Think Families	G		Support for Families - Think Families	BCCInternet
9	Economy	Strategy for the Conservation and enjoyment of Birmingham's Historic Environment 2013	G		Strategy for the Conservation and enjoyment of Birmingham's Historic Environment 2013	BCCInternet
10	Economy	Birmingham Connected	A		Birmingham Connected	BCCInternet
11	Economy	Clean Air Strategy	G		Blueprint for low carbon fuel infrastructure	BCCInternet
12	Economy	Big City Plan	G		Big City Plan	BCCInternet
13	Environment	Local flood risk management strategy for Birmingham	G		Local flood strategy	BCCInternet
14	Finance	Medium term financial plan	G	2024	Medium-term Financial Plan	BCCInternet
15	Finance	Council tax support hardship policy	A		Council tax hardship support policy	BCCInternet
16	Finance	Council tax support hardship payment scheme policy framework	A		Council tax support scheme	BCCInternet
17	Economy	Covid-19 Recovery Strategy	R		Covid-19 Economic Recovery Strategy	BCCInternet
18	Inclusive growth	East Birmingham Inclusive Growth Strategy 2021	G	2021	East Birmingham Inclusive Growth Strategy	BCCInternet
19	Neighbourhoods	Parks & Open Space Strategy	A		Parks & Open Spaces Strategy	BCCInternet
20	Neighbourhoods	Parks and open spaces Supplemental Planning Document	G		Parks planning document	BCCInternet
21	Neighbourhoods	Waste Strategy 2017-2040	A	2040	Waste Strategy 2017-2040	BCCInternet
22	Neighbourhoods	Walking and Cycling Strategy	G		Walking and Cycling Strategy	BCCInternet
23	Neighbourhoods	Floodlighting of Sports Facilities, Car Parks & secure areas	G		Floodlighting of sports facilities, car parks and secure areas	BCCInternet
24	Strategic	Council tax support scheme	G		Council tax support scheme	BCCInternet
25	Strategic	Unpaid council tax recovery policy	A		Unpaid council tax recovery policy	BCCInternet
26	Strategic	Business Rates Discretionary Relief Policy	A		Business Rates Discretionary Relief Policy	BCCInternet
27	Strategic	The Strategy for the Councils Workforce	R		The Strategy for the Councils Workforce	BCCInternet
28	Strategic	Local Welfare Provision Policy	G		Local Welfare Provision Policy	BCCInternet
29	Strategic	Citizen Access Strategy	R		Citizen Access Strategy	BCCInternet
30	Strategic	Birmingham Major Sporting Event strategy	G		Birmingham Major Sporting Events Strategy	BCCInternet
31	Strategic	Private sector Empty Property Strategy	R		Private Sector Empty Property Strategy	BCCInternet
32	Strategic	Flood risk plans and strategy	G		Local Flood Risk Management Strategy	BCCInternet
33	Strategic	ICT and digital strategy (2016 to 2021)	R	2021	ICT & Digital Strategy	BCCInternet
34	Strategic	Major sporting events strategy	G	2032	Major Sporting Events Strategy	BCCInternet
35	Strategic	Nature Conservation Strategy for Birmingham	G		Nature Conservation Strategy for Birmingham	BCCInternet
36	Planning & Development	Regeneration through Conservation: Birmingham Conservation Strategy	G		Regeneration through Conservation	BCCInternet
37	Planning & Development	Archaeology Strategy: Building the future protecting the past	G		Archaeology Strategy	BCCInternet
38	Planning & Development	Local welfare provision policy	G		Local welfare provision	BCCInternet
39	Benefits & Support	Big city plan	G		Big city plan	BCCInternet
40	Planning & Development	Extending your home: home extensions design guide	G		Home extension guide	BCCInternet
41	Housing	Birmingham Homelessness Prevention Strategy 2017+	G		Birmingham Homelessness Prevention Strategy 2017+	BCCInternet
42	Housing	Birmingham Development Plan 2031	A	2031	Birmingham Development Plan	BCCInternet
43	Planning & Development	Unitary Development Plan	G	2017	Unitary Development Plan	BCCInternet
44	Planning & Development	Birmingham Education Services Delivery and Improvement Plan	G		Education Services Delivery and Improvement Plan	BCCInternet
45	Schools & Learning	Birmingham Cultural Strategy 2016 - 2019	G	2019	Cultural Strategy 16 -19	BCCInternet
46	Culture, Arts & Heritage	Birmingham Business Charter for Social responsibility	G		Birmingham Business Charter for Social responsibility	BCCInternet
47	Procurement Services	Sexual Health Strategic Plan	G		Sexual Health Strategic Plan	BCCInternet
48	Public Health	Alcohol Strategy 2012 - 2016	G	2016	Alcohol Strategy 2012-2016	BCCInternet
49	Public Health	Low Carbon Transport Strategy	G		Low Carbon Transport Strategy	BCCInternet
50	Roads, Travel and Parking	IT and Information Security Policies	G		IT and Information Security Policies	BCCInternet
51	IT&D	Playing pitch strategy and action plan 2017	G	2017	Playing pitch strategy and action plan 2017	BCCInternet
52	Planning & Development	Lighting Places: A lighting strategy for the city centre and local centres of Birmingham	G		Lighting Places: A lighting strategy for the city centre and local centres of Birmingham	BCCInternet
53	Planning & Development	City Centre Retail Strategy	G		City Centre Retail Strategy: Creating a world-class destination	BCCInternet
54	Planning & Development	Longbridge Area Action Plan: Environment, open space and landscape strategy plan	G		Longbridge Area Action Plan: Environment, open space and landscape strategy plan	BCCInternet
55	Planning & Development	Living wage policy	G		Living wage policy	BCCInternet
56	Procurement Services	Charter policy	G		Charter policy	BCCInternet
57	Procurement Services	Development Management in Birmingham DPD	G		Development Management DPD	BCCInternet
58	Planning & Development	Beeches, Bars and Booths (3Bs) Neighbourhood Development Plan	G		Beeches, Bars and Booths	BCCInternet
59	Planning & Development	Our Future City Plan	A		Our future city plan	BCCInternet
60	Planning & Development	Birmingham Design Guide Draft SPD	G		Birmingham Design Guide	BCCInternet
61	Planning & Development	Draft Commissioning Strategy Summary for home support, supported living and residential care (with and without nursing)	G		Draft Commissioning Strategy Summary for home support, supported living and residential care (with and without)	BCCInternet
62	ASC	Birmingham city council education prosecution policy 2019	A		BCC Education Prosecution Policy 2019	BCCInternet
63	Children's	Homelessness prevention strategy	A		Homelessness Prevention Strategy	BCCInternet
64	Housing					