Manchester City Council
Report for Information

Report to: Resources and Governance Scrutiny Committee – 7 September 2023

Subject: Resident and Business Digital Experience Programme (RBDxP) Progress Update

Report of: Deputy Chief Executive and City Treasurer

Summary

This report provides an update on the Resident and Business Digital Experience Programme (RBDxP), the Programme's approach to user engagement and progress made in the procurement of new technology to replace the Council's existing Customer Relationship Management (CRM) System, eForms and integration technology.

The report also provides an update on the ongoing improvements that the Revenues and Benefits service are introducing to improve how the Council interacts with Residents and Businesses which compliments the RBDxP.

A previous report was brought to Committee in October 2022 providing an update on the RBDxP.

Recommendations

The Resources and Governance Scrutiny Committee are requested to consider and comment on the content of this report, progress made to date and support the outlined next steps with this important Programme.

Wards Affected: All

Environmental Impact Assessment - the impact of the issues addressed in this report on achieving the zero-carbon target for the city
The Future Shape of the Council aims to improve the Council's efficiency and effectiveness in the context of reducing our carbon impact including in areas such as estates, printing, and travel. The successful delivery of the digital and ICT approach will be integral to this.

Equality, Diversity and Inclusion - the impact of the issues addressed in this report in meeting our Public Sector Equality Duty and broader equality commitments
The Programme will be focusing the digital services around the users' needs and developing a user centred design approach, also incorporating inclusive design across the journey.

User engagement and feedback from residents and users has informed our requirements and will be used as the Programme progress to ensure that we build easy to use digital services for those who can and want to use them.

The Programme Team have developed an Equalities Impact Assessment (EIA) and work closely with the Equality, Diversity and Inclusion Team and Digital Inclusion Team who have been supporting and advising the Programme from the outset.

By engaging with different groups and also following government standard accessibility guidelines and incorporating inclusive design throughout the processes the Programme will improve the experience for all our Residents and Businesses.

Manchester Strategy outcomes	Summary of how this report aligns to the OMS/Contribution to the Strategy
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	The Future Shape of the Council Programme is designed to strengthen the delivery of the priorities in Council's Corporate Plan, and as a result, all the Our Manchester Strategy outcomes. Some of the workstreams will also have a more direct impact as outlined below.
A highly skilled city: world class and home grown talent sustaining the city's economic success	The Council is providing an opportunity for roles within the Programme Team on development and degree apprenticeship opportunities.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	Social Value commitments of the contracts include providing digital literacy sessions to local communities and offers of technology.
A liveable and low carbon city: a destination of choice to live, visit, work	The Programme will introduce new up to date cloud-based technologies which will provide an integration with line of business systems. These integrations will reduce the reliance on paper and printing where possible and support the reduction in carbon emissions.
A connected city: world class infrastructure and connectivity to drive growth	The Council adopting technology and delivering digitally makes a positive contribution to Manchester's ambition to be a leading and inclusive Digital City.

Full details are in the body of the report, along with any implications for:

- Equal Opportunities Policy
- Risk Management
- Legal Considerations

Financial Consequences – Revenue

The annual subscription costs for the CRM and integration application are c£206k and c£109k respectively.

The first three years of the CRM system will be funded from the Programme capital budget. Thereafter the ongoing annual subscription costs will be funded from the Council's ICT revenue budget.

The first year annual subscription costs for the integration application will be funded from the Programme capital budget. Thereafter the ongoing annual subscription costs will be funded from the Council's ICT revenue budget.

Financial Consequences – Capital

The implementation costs for the CRM and integration application are c£795k. These costs are being funded from the Programme capital budget.

Contact Officers:

Name:		Carol Culley
Position:	Deputy Chief Executive and City Treasurer
Telephone:	0161 234 3406
E-mail:		carol.culley@manchester.gov.uk

Name:		Lee Owen
Position:	Head of Revenues, Benefits and Customer Services
Telephone:	0161 245 7525
E-mail:		lee.owen@manchester.gov.uk

Name:		Jon Burt
Position:	Head of Enterprise Architecture
Telephone:	07971 620993
E-mail:		Jon.Burt@manchester.gov.uk

Name:		Alexander Forbes
Position:	RBDxP Programme Manager
Telephone:	0161 234 1820
E-mail:		Alexander.Forbes@manchester.gov.uk

Background documents (available for public inspection): None

1.0 Introduction

1.1 The Resident and Business Digital Experience Programme forms part of the transformation of how we work as a Council, driven by digitising and streamlining how we work in the Corporate Core. The Resident and Business Digital Experience Programme (RBDxP) is a key part of this and has been set up to make the Council much easier to engage with for residents, businesses and Councillors reporting and tracking their casework. The appended user persona's exemplify how those improvements will be felt.

1.2 As part of RBDxP we will replace the Council's existing customer relationship management system (CRM), it's interface with line of business systems, content management system (website) and eForms package in one integrated Digital Platform so that Council front-facing systems interact to the benefit of our residents and businesses.

1.3 The Programme last appeared before the Scrutiny Committee in October 2022. This report will provide an update on progress made across the Programme since then including how the Programme has continued to engage with service areas across the Council, residents, businesses and Members to ensure the new systems are designed to meet the needs and expectations of users.

2.0 Background

2.1 In October 2022 the Programme provided an update on progress of the Programme and plans for resident and business engagement.

2.2 The report also provided information on the open tender process that took place to select new technologies which will replace the Council's CRM, Content Management System (CMS) and integration technology in a single digital platform. This report provides an update on the changes made to the Programme and subsequent work since that report.

3.0 Update on Resident and Business Engagement

3.1 The Programme has continued to progress extensive engage with service areas across the Council, residents, businesses and Members. Service engagement activities have focussed on understanding service areas requirements which will inform the design of the Council's new CRM system, eForms and email notifications.

3.2 Robust and detailed user research is a key objective of RBDxP to ensure that Council services are data driven, accessible for all and are designed to meet the needs and expectations of residents, businesses, and Members. Since the Programme commenced, significant Resident and Business user engagement has taken place across the City as well as specific engagement with Members through lunch time and evening Member engagement sessions. The RBDxP team have been working with Neighbourhood teams and the Equalities,

Diversity and Inclusion (EDI) Team to identify channels and community groups to engage with.

3.3   To date, the Programme have carried out:
- Online surveys 'Improving manchester.gov.uk' for residents and businesses, to capture website feedback and equalities data;
- Website feedback sessions in the Town Hall Extension and local libraries (Manchester Central, Longsight, Gorton Hub).
- In-person workshops in the City Centre and Wythenshawe, alongside an online workshops for those who preferred this channel;
- Attended digital inclusion events in Harpurhey and Clayton to speak to residents to understand the challenges they face when interacting online;
- Presented at business and resident forum events in Chorlton, Moss Side, Clayton, Piccadilly and the Northern Quarter to gather feedback;
- Held Policy Panel Sessions with Members.

3.4   More than 100 residents have so far signed up to the Resident User Group which the Programme will engage with further as part of the Development and Testing phases of the Programme to ensure that our digital services are aligned to the needs of users.

3.5   As the Programme progresses, we will continue to work with colleagues in the EDI team and we will continue to engage with residents, businesses and Members throughout the lifecycle of the Programme.

3.6   The next phase of user engagement will focus on underrepresented communities to ensure that we meet the needs of all our residents. The RBDxP team will be working with colleagues across the Council and external organisations to identify and understand the most effective way to communicate with Manchester's diverse communities including Black, Asian and Minority Ethnic groups, disability groups and trans inclusivity.

3.7   Once the new digital platform is available the Programme Team will engage with the Resident User Group to ensure that user needs are developed our digital services are aligned to the needs of users.

3.8   Feedback from this user research has also provided the data and insight for the RBDxP team to develop a detailed set of User Personas (Appendix 1). These will be used to understand the needs and challenges residents and businesses face when interacting with the Council and will be used as part of user testing in the future. The developed personas have been shared with colleagues in the Communications team and ratified by the RBDxP Project Board. New user personas will be developed if any gaps are identified as the Programme progresses.

4.0   Update on Procurement approach of the new Digital Platform

4.1.1   In 2022 the Programme undertook an open tender procurement process to select a single digital platform to replace the Council's existing CRM system,

website, webforms and integration technology which interfaces these systems with line of business systems.

4.1.2 During detailed discussions at the contract award stage of the procurement it became apparent that the tender submission did not meet the Council's requirements. As a result of this the decision was made to withdraw the tender and to review the Programme's approach to procuring the new technology.

4.1.3 As a result the procurement was divided into the CRM system and webforms and the integration technology that links the CRM to line of business systems such as Biffa our waste management system. This will be followed by replacing and improving the Council's Content Management System (website).

4.2 Procurement

4.2.1 A series of demonstrations with CRM suppliers took place. The suppliers were based on recommendations made by Gartner and our Digital Transformation Consultancy Partner, Methods and were validated by the Council's Head of Enterprise Architecture.

4.2.2 The suppliers were asked to demonstrate the suitability of their product against a number of critical requirements to a panel of Service representatives. This process helped us to better understand the suppliers in the market and understand what capabilities our future CRM solution needed to include. The Programme followed a Crown Commercial Services G-Cloud 13 procurement route to accelerate the procurement timescales.

4.2.3 Following consideration of all responses from each supplier a recommendation to award the contract to Verint was approved by the RBDxP board for the replacement CRM system. The contract has now been finalised and start up activities commenced in August 2023.

4.3 Integration Technology

4.3.1 Two further contracts have been awarded to implement the Council's new integration technology that will connect the new CRM system with line of business systems to provide a seamless interface across services and experience for service users. Both contracts were awarded using the Crown Commercial Services framework.

4.3.2 The first contract was for the licences for the Implementation Layer software, MuleSoft, a market leading software solution which will bring more robustness and flexibility to the Council's ICT infrastructure through its ability to quickly and securely integrate messages between systems.

4.3.3 The second contract is for an implementation partner to support the Council with developing and implementing the new integration system and to develop the first set of system integrations which will subsequently be taken into support within the Council's ICT team.

5.0   Implementation Approach

5.1.1   Whilst the procurement activities described were being delivered the RBDxP team have continued to work closely with service areas to understand and validate the current services and processes which will be replicated within the new CRM system and to gain a detailed understanding of the functionality required to develop in the new system by the end February 2024.

5.1.2   The Programme will plan the implementation with the new suppliers based on high transaction and high-risk processes/forms being developed early in the Programme lifecycle.

5.1.3   Service resources will support the design of the new system at different points through the development lifecycle and not all forms will be developed for a particular service at the same time. This is to minimise the impact should not all current functionality be delivered by the time the current CRM system has to be decommissioned.

5.1.4   To ensure that we minimise impact to existing services we will focus on delivering key service requirements first. The team have held detailed workshops defining and agreeing these requirements in collaboration with service areas. This will be followed by future phases of the programme to develop and deliver the service Improvements identified as part of the detailed user engagement completed.

5.1.5   Beyond February 2024 the RBDxP team will continue to work with services to further develop the new systems to transform the Council's digital services and deliver the improvements and objectives as set out by the Programme. This will realise the benefits of developing new modern technologies for the Council's residents, businesses, service users and Members.

5.1.6   In order to build on the work carried out with stakeholders from across community groups, residents, Members and officers a number of 'Personas' have been developed. They are representations not of real people but of user experiences. As such they form a part of the user centred design process we will adopt when designing our new services and systems.

5.1.7   The developed 'Personas' will be used to inform how we design services, and they will also inform our user testing, sign off of our new systems and will be a key success criteria for the programme. By using 'Personas' we will ensure that our Design Principles are achieved.

5.1.8   One of the thirteen Personas we have developed is Sheila who is new to Manchester. One of Sheila's frustrations is the difficulty in raising issues and getting accurate updates when she has raised an issue. One of the things that she wants is to upload a photo with a report.

5.1.9   As part of the Programme we will use the Personas such as the example of Sheila above to understand the frustrations and needs of our residents and to ensure we design our services and systems to address these frustrations and

to significantly improve the experience for our residents when interacting with the Council and its services.

5.1.10 Examples of further Personas are given at Appendix A

5.2 **Timescales**

5.2.1 Project activities are being planned in August and September and a detailed plan to deliver the Programme will be developed and agreed in conjunction with our new suppliers.

5.2.2 The Programme will hold a checkpoint in September of this year in order to determine which service/transactional areas are at risk of not being fully developed in the new system by the end of February 2024 when the decommissioning of the existing CRM system will need to commence. This will be worked through in conjunction with service areas and alternative/interim processes agreed where required.

5.2.3 The Public Service Network (PSN) allows the Public sector to share information such as information on benefits from the Department of Work and Pensions. To ensure the Council remains compliant with the PSN requirements the decommissioning of the Council's existing CRM system, Microsoft CRM 4, and integration technology, Biztalk, will need to commence from the end of February 2024. This will enable the removal of the two systems which are out of extended support from the Council's technical infrastructure including the aging servers which these systems currently sit on.

6.0 Programme Priorities and Next Steps

6.1 The Resident and Business Digital Experience Programme's (RBDxP) current priorities and next steps are as follows:

- The RBDxP team will work with the new suppliers to onboard them into the Programme.
- A detailed implementation plan and service order will be developed and agreed with both service areas and the new suppliers.
- A comprehensive Programme communications plan will be produced including continued engagement with residents, businesses, community groups and Members.
- The RBDxP team will continue with user research and engagement activities in particular focusing on underrepresented groups.
- The design and build of the new systems will commence.
- The decommissioning of the existing CRM and Integration systems will be planned.

7.0 Improvement activities in Revenues and Benefits

7.1 RBDxP will include Revenues and Benefits services and interactions in a later phase of the Programme and the Service have been involved in the

procurement process of the new CRM system. Alongside these activities the Revenues and Benefits service have been looking at how they can better engage and interact with residents.

7.2   As part of this work the Council Tax Service is introducing a new cloud-based automation platform to automate the back-office processing of a range of common online customer requests, including Direct Debit, change of address, single person discount, etc. Introduction of this new technology will enhance the customer journey by improving billing speed and the processing of customer requests and notifications whilst enabling resources to be released to spend more time providing proactive outreach support to identified vulnerable resident groups, communities and families. The first phase of this work is expected to be delivered by early 2024.

7.3   The Council Tax Service have used SMS reminders for missed Council Tax payments since 2017, which to date has worked well. To build on this approach, the service is working with a third-party to develop a mixed approach to early engagement with residents who are late with payments, including a three-channel engagement approach with automated outgoing phone calls, e-mails and text messages. Where residents received a phone call, they will be able to connect automatically with a Member of the Council Tax team to make a payment, arrange a sustainable payment plan and additional support which can be provided/accessed. This early opportunity to engage with the service, will offer support before recovery action takes place, will allow additional support to be identified and issues to be resolved, vulnerabilities to be highlighted and improve resident outcomes.

7.4   In addition to this, the service has introduced a series of new online webforms in July 2022 which gather comprehensive information, streamline requests and enhancing overall efficiency and speed of response. The team have worked with Strategic Communications, stakeholders and residents, promoting the benefits of using the new forms rather than using email as a method of contact. Following the introduction of the new online forms demand has shifted significantly from email to webform with 70% of digital contacts now being received via the webform. The new forms have also reduced the need for follow up contacts, saving time and ensuring residents experience smoother interactions and an improved experience when interacting with the service. The streamlined and improved process has led to a notable reduction in the overall volume of interactions made to the service since the new forms were introduced.

8.0   Recommendations

8.1   The Resources and Governance Scrutiny Committee is requested to consider and comment on the content of this report, progress to date and support the next steps with this important Programme.