Manchester City Council
Report for Information

Report to: Communities and Equalities Scrutiny Committee Briefing Note – October 2023

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

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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, Integration technology and CMS (Website).

1.0   Background

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.

1.2   As part of RBDxP we will replace the Council's aging existing customer relationship management system (CRM), it's interface with line of business systems (integration layer), content management system (CMS) (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   Its aim is to improve how we deliver digital services to residents and businesses. Where users have access to digital services we aim to make it their channel of choice.

1.4   We have been listening to residents through user research to understand what is important in how they report things to the Council.

1.5   Our engagement with Members started during the Discovery phase in 2020 and with the Policy Panel sessions in September 2022. This engagement will continue to help us to understand how we can improve the digital offer to the Residents and Businesses of Manchester as well as supporting members with casework specifically the reporting and tracking of reports and requests.

1.6   Throughout this we have been working with our colleagues in services across the Council to improve digital processes and information. To achieve this we have been analysing business processes, reviewing forms and automated

email notifications. This is to ensure that they are accurate, up to date, removing jargon and they are accessible for those who can and choose to use digital channels using the learning and insight from the extensive engagement with service users conducted across the programme.

1.7   RBDxP will provide a range of benefits for different users. The diagram below illustrates some of these.
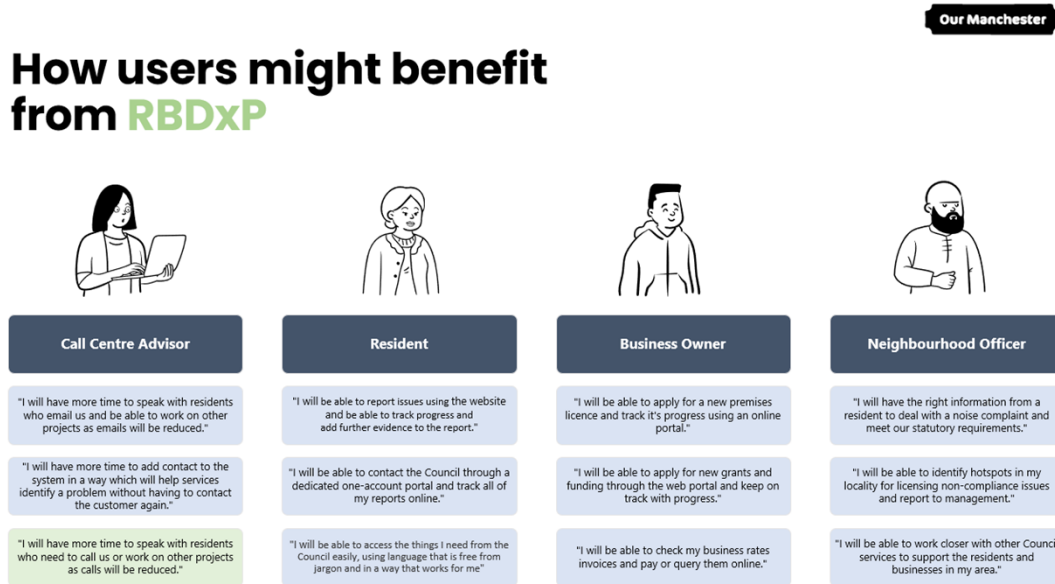

Diagram 1: How users may benefit from RBDxP

1.8   A further example of how this would benefit Residents would be the ability for them to upload photographs to support their reports and requests.

2.0   Procurement of new Technology

2.1   The Programme's approach to procuring the new technology has been divided into three component parts as set out below:

     a. CRM system and webforms
     b. Integration technology that links the CRM to line of business systems such as Biffa our waste management system.
     c. Content Management System (website).

2.2   Procurement

2.2.1   A series of demonstrations with CRM suppliers took place. 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.

2.2.2   The Programme followed a Crown Commercial Services procurement route to accelerate the procurement timescales. 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.

2.2.3   The Digital Delivery Board selected Mulesoft as the integration technology. Following Crown Commercial Services framework procurement exercise, HCL Technologies was selected to implement Mulesoft.

2.2.4   The procurement of the Councils new CMS (website) will commence in the Autumn of 2023.

3.0   Timescales

3.1   Public Sector Network

3.1.1   The Public Service Network (PSN) allows the Public sector to share important information across organisations and services 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 commence from the end of February 2024. This will enable the removal of the two systems which are out of extended support including the aging servers which these systems currently sit on. Subsequently the new CRM system and Integration layer technology will be developed and go live from this date, providing an 'As Is' replacement of both legacy systems.

3.2   Implementation

3.2.1   The RBDxP team have worked 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 be developed in the new system by the end February 2024.

3.2.2   Service resources have supported 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.

3.2.3   To ensure that we minimise impact to existing services we will focus on delivering key service requirements first. The Programme has held detailed workshops defining and agreeing these requirements in collaboration with service areas.

3.2.4   Once the first phase, which will focus on the "As Is" system replacement has been delivered, the next phases of the programme will see the service improvements identified as part of the detailed user engagement delivered. This phase of the programme will ensure we make best use of the new functionality that will be available within the new systems/technology to improve the experience for our residents, businesses and members when interacting with Council services.

3.2.5 In addition to improvements to the new CRM system, the programme will also lead the design and implementation of the Council's new Content Management System (Website).

3.3 High Level Plan

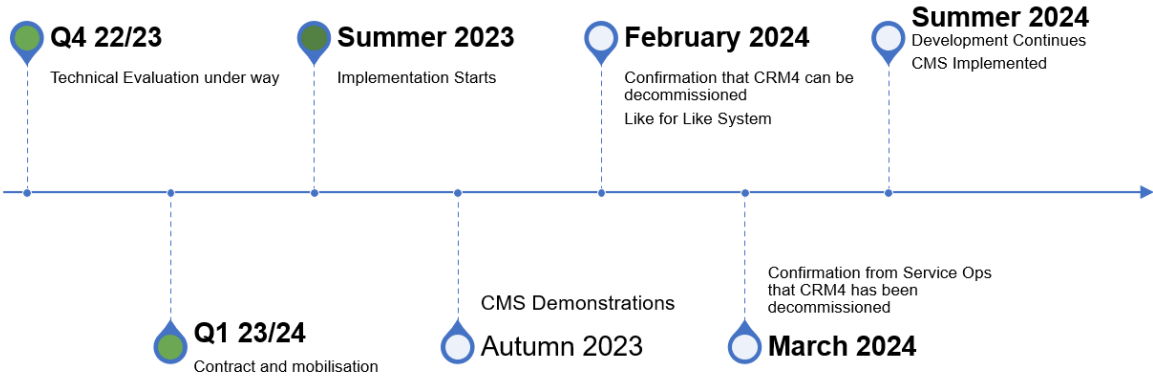3.3.1 The high level plan in shown below.

Diagram 2: RBDxP High Level Plan

4.0 Services Supported

4.1 The following services are in scope for Phase 1 and will have their "As Is" business processes developed and implemented in the new CRM system by the end of February 2024:

- Waste, Recycling and Street Cleansing
- Highways
- Parking
- Contact Centre
- Neighbourhood Services (including Compliance and Enforcement, Grounds Maintenance and Parks)
- School Admissions (including Home to School Transport)
- Elections

4.2 Phase 2 of the Programme will see the implementation of the digital improvements to the above Service areas identified as part of the detailed user engagement completed by the programme as well as the development of new digital services for other Council services such as;

- Revenues and Benefits
- Pest Control
- Licencing

5.0 RBDxP User Engagement

5.1 The Programme has continued to progress extensive engagement 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.

5.2 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.

5.3 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.

5.4 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.

5.5 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.

5.6 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.

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

6.   Equalities

6.1   We have worked with our Equalities team throughout RBDxP. They were fully involved in the early discovery work, helped to define our requirements and were part of our technology selection panel.

6.2   Our Equalities Impact Assessment is a living document which we continue to develop and will be refined and updated throughout the lifecycle of the programme.

6.3   Our system will conform with the Web Content Accessibility Guidelines. Specifically, we will adhere to the latest standard 2.2 AA. In order to assist us we will be commissioning an independent assessor to provide a report on our conformity.

7.   Personas

7.1   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.

7.2   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.

7.3   One of the thirteen Personas we have developed is Anya who is new to IT. One of her frustrations is finding a telephone number when she is struggling to complete an online form and would like someone to help her. One of the things that she wants is to get help completing a form.

Anya
New to IT

Our Manchester

Who is Anya?
- Anya recently completed Digital Inclusion training at Moston library
- She's newly connected to the Internet, using a tablet which was bought for her by her son
- She's not confident in completing an online form and would like some help

My frustrations with the Council
- I can't find a telephone number when I am struggling to complete a request online and would like someone to help me

What I want from the Council
- Quick and easy way to access my Council account which means I can save time by not ringing
- To know I'm not being scammed when using the Council website
- If I do get stuck that I can ring the Contact Centre and an advisor can see my completed form and help me with requesting online so that I know how to do it in the future

Diagram 3: Persona - Anya

The Personas of Councillor Rogers and a Customer Centre Operative, Jenny, are given below. Both of these illustrate some of the frustrations they feel and what they want from the Council.

Councillor Rogers

Who is Councillor Rogers?
- Has served as a Councillor in Manchester for 15 years
- Councillor Rogers raises enquiries, service requests and reports issues on behalf of their residents

My frustrations with the Council
- The system doesn't make it easy for me to understand the progress of multiple service requests that I have raised
- I want to be notified throughout the process, so that I can keep my residents informed about issues in their area

What I want from the Council
- I want regular and accurate updates on things I report that I can share with my residents

Our Manchester

Diagram 5: Persona – Councillor Rogers

Jenny
Contact Centre Operative

Who is Jenny?
- Jenny works in our contact centre answering calls and emails from our residents and business

My frustrations with the Council
- Our CRM is slow to work and often breaks when I'm speaking to callers, which means I spend longer on calls than I should be
- It's hard to see the history of a case, making it hard for me to update callers efficiently

What I want from the Council
- The tools to do my job, they need to be reliable, quick and easy to use
- Customer histories that are easily accessed so I can understand the context of the call or email

Our Manchester

Diagram 5: Persona – Jenny

8. Member Engagement

8.1 The Programme will continue to engage with Members including a demonstration of the new system prior to Go Live. This will take place in the first two months of 2024 and provide members with the opportunity to see the first phase of the development of the new CRM system and further

engagement sessions and demonstrations will take place with members as the new technology continues to be developed and refined.