

Manchester City Council Report for Information

Report to: Resources and Governance Scrutiny Committee – 5 September 2024

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

Report of: Deputy Chief Executive

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.

A previous report was brought to Committee in September 2023 providing an update on the RBDxP, including details of user engagement carried out with residents, businesses and members to help shape the Programme and examples of a number of User Personas developed in response to this user engagement which will inform the new system design. The previous report also detailed the approach taken to the procurement of a new CRM system and Integration technology for the Council and anticipated implementation timelines of these new systems to support delivery of the first phase of the Programme.

Since the last report to the Committee good progress has been made across the Programme with the go live of the Council's new CRM system on the 17 April. This also included the introduction of a new integration technology which links the new CRM system with other line of business systems so that requests and reports received from residents and members are passed seamlessly to the relevant service area to investigate/action/resolve.

The replacement of this technology has resolved the significant risks posed by the previous CRM system and supported the Council in retaining its Public Service Network accreditation which allows the Council to share important information and links to systems with key partner organisations such as the DWP and the NHS.

A number of additional system enhancements have also been introduced to improve the experience of residents, businesses and members when interacting and accessing Council services with further detail of these enhancements provided later in this report.

The next phase of the programme will see further improvements introduced to the new CRM system to meet the needs and expectations of residents, businesses and members, the continued development of the new CRM system to support and improve the delivery of further Council services and the procurement and

implementation of a new Website for the Council to improve the Councils digital services.

Recommendations

The Resources and Governance Scrutiny Committee are recommended to consider and comment on the content of this report, the progress made to date in the delivery of the Resident and Business Digital Experience Programme and the outlined next steps across the 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

A key priority for the Council is 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 Councils 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 Resident and Business Digital Experience Programme will ensure that the Councils digital services are designed around the needs of users and are accessible to all, providing the best possible experience for residents, businesses and members when interacting with the Council digitally.

User engagement and feedback from residents, businesses and members has informed our requirements and will be used as the Programme progresses 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 a diverse range of community groups including underrepresented groups across the City to understand their needs and expectations and ensuring our new systems and processes follow government standard accessibility guidelines such as incorporating inclusive design for all services and systems across the Programme we will ensure our services are accessible to all, improving the experience for all of our residents and businesses when accessing and interacting with Council services.

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 new Customer Relationship Management system (CRM) and integration technology 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.

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Background documents (available for public inspection): None

1.0 Introduction

- 1.1 The Resident and Business Digital Experience Programme (RBDxP) forms part of the transformation of how we work as a Council, driven by digitising and streamlining how we deliver Council services. The RBDxP is a key part of this and has been set up to improve the experience for residents, businesses and members when accessing and interacting with Council services, reporting issues, requesting services and tracking casework.
- 1.2 Phase one of RBDxP was to replace the Council's existing CRM system, it's interface with line of business systems and the Councils website and eForms package into one integrated Digital Platform so that Council front-facing systems interact to the benefit of our residents, businesses and members.
- 1.3 The Programme last appeared before the Scrutiny Committee in September 2023. 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 implemented by the Programme are designed to meet the needs and expectations of users.

2.0 Background

- 2.1 In September 2023 the committee were provided with an update on progress made in the delivery of the Resident and Business Digital Experience Programme including engagement activity taken forward with residents, businesses and members to ensure the new systems implemented by the Programme meet the needs and expectations of users.
- 2.2 This report provides an update to the committee on progress made across the Resident and Business Digital Experience programme since the last report.

3.0 Implementation of new Customer Relationship Management system and Integration technology

- 3.1 In our last report to the Committee, we shared details of the programmes approach and anticipated timelines to replacing the Councils existing CRM system, with a new system provided by Verint and the implementation of a new integration technology, provided by Mulesoft.
- 3.2 The first phase of the Residents' and Business Digital Experience Programme (RBDxP) saw the go live of the Councils new CRM system on the 17 April. This also included the introduction of a new integration technology which links the new CRM system with other line of business systems so that requests and reports received from residents and members are passed seamlessly to the relevant service area to investigate/action/resolve.
- 3.3 Whilst the focus of the first phase of the RBDxP programme has been to provide a 'like for like' system to resolve the significant risks posed by the previous CRM system, we have taken the opportunity to add some additional

features which benefit both our residents and colleagues across the Council. These include reviewing, merging and streamlining some of our forms to improve residents' journey and experience when interacting with services, and for the first time residents and members can now upload photographs to support a report or request which enables services and teams to more accurately identify and resolve issues more effectively.

3.4 To date over 160 email notifications have been reviewed and developed in the new CRM system and the RBDxP team will continue to work with service areas to refine and improve email notifications sent to residents and members.

3.5 We have also improved and added more information to our maps making it easier for residents to pinpoint an issue. In addition, we sought to streamline processes, so we are more efficient by including new links to the Council's Highways system, the Council's telephone system and the soon to be launched Neighbourhoods system.

3.6 The new CRM system now supports delivery of the following services: -

- EHCP and Home to School Transport
- Elections
- Emergency Control Service
- Dog Services
- Environmental Protection
- Airport, Food Health and Safety
- Grounds Maintenance
- Housing Compliance Enforcement
- Highways
- Neighbourhood Compliance
- Licensing and Out of Hours
- Waste, Recycling and Street Cleansing

3.7 To date over 90,000 reports and requests have been processed through the new CRM system.

4.0 Accessibility and User Engagement

4.1 A third-party accessibility assessor Invuse has recently completed a full audit of the new CRM system forms and found the new system to be accessible and compliant with the latest accessibility standard, Web Content Accessibility Guidelines (WCAG) version 2.2AA.

4.2 To ensure that our new online forms are as user-friendly and as simple to use for our residents, businesses and members as possible, we have also initiated a usability assessment with the same provider, this usability testing will place our users' needs at the heart of our digital services design and delivery.

4.3 Invuse will carry out detailed end-to-end tests using a range of different devices and assistive technologies, to identify any user journey issues or barriers with our online forms. The outcome of this testing will help us to

further improve the layout and design of our online forms to make them easier and quicker for residents, businesses and members to use.

- 4.4 In preparation of the go-live of the new CRM system the RBDxP Team worked closely with a resident user group to test some of the new forms and provide feedback on them. We have used this feedback, along with survey and workshop responses from more than 175 residents from every Manchester ward, to improve the user journey where identified/required.
- 4.5 To build upon our extensive programme of user research and the upcoming usability form testing, the RBDxP team will continue to engage with the resident user group in the coming months to test further forms, again using this feedback to improve the experience for our residents, businesses and members when interacting with the Council digitally.
- 4.6 Based on our research findings, the Programme have developed a set of Manchester-specific user personas which have previously been shared with the committee and will continue to be used to test our new systems, forms and services. These personas help to pinpoint common challenges faced by users and to test the new system and services from their point of view.
- 4.7 Extensive engagement has also taken place with Manchester businesses to understand how they would like Council services to work for them. The RBDxP team have spoken to a range of businesses at engagement events held across the city region, including forums in Chorlton, Moss Side, Clayton, Piccadilly, Northern Quarter and online. Alongside the engagement events, we shared our feedback survey via the Council's Business bulletin (more than 11,000 Manchester businesses and residents), the Growth Co, GM Chamber of Commerce, City Co and Federation of Small Businesses. The Programme will continue to engage with businesses as part of our ongoing user research activities.
- 4.8 A number of further briefing sessions with members will also be held in the Autumn. The aim of these sessions will be to further update members on the progress of RBDxP, provide further details of future planned developments and improvements and to gain any further feedback members may wish to provide on the new system.

5.0 Future Developments

- 5.1 The Programme continues to review and respond to feedback from residents, members and colleagues from across the Council on how the system can be improved further and the RBDxP team will continue to refine and make improvements to the system in response to this feedback.
- 5.2 An area of specific focus will be on how email notifications sent to residents, businesses and members updating them on the progress and the outcome of reports and requests can be further improved, tailored and refined.

5.3 Over the coming months the RBDxP team will also begin working with colleagues across the Revenues and Benefits service, Legal Services and the Councils' Complaints team to understand how the new CRM system can be developed to support and improve their processes.

6.0 Update on Procurement approach of the new Content Management System

6.1 The next phase of the programme will also see the procurement and implementation of a new website for the Council to improve the experience for residents, businesses and members when interacting with the Council and its services digitally.

6.2 A similar approach to the procurement of the new CRM system has been taken with a number of market leading website suppliers invited to demonstrate their website offer to the Council. These suppliers were selected based on recommendations made by our Digital Transformation Consultancy Partner, Methods, and Gartner and were validated by the Council's Head of Enterprise Architecture.

6.3 It is anticipated that the contract to provide the Councils new website will be awarded in the Autumn of this year with go live of a new Council website in the summer of next year 2025.

7.0 Programme Priorities and Next Steps

7.1 The RBDxP current priorities and next steps are as follows:

- Continue to work with a range of user groups and continue to take forward a diverse range of engagement activities and approaches in particular focusing on underrepresented groups to ensure our services and systems are accessible to all and meet the needs and expectations of users.
- Continue to improve the new CRM system, adding new functionality and improving existing features such as email notifications and updates.
- Procurement and implementation of a new website for the Council.
- Work with colleagues across the Revenues and Benefits service, Legal Services and the Councils' Complaints team to understand how the new CRM system can be developed to support and improve their processes and services.

8.0 Recommendations

8.1 The Resources and Governance Scrutiny Committee is requested to consider and comment on the content of this report, the progress made since the last update to the committee in the delivery of the RBDxP and the outlined Programme next steps.