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KIRKLEES COUNCIL

CUSTOMER FIRST - Project Initiation Document

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1. Rationale for change

In 2006, our service, together with Kirklees Direct received national recognition, by winning the "Excellence in Customer Care" award at the IRRV conference. Rather than rest on our laurels following this success, we are looking to move to the next level in terms of customer care.

The "**customer first project**" will have a major effect on how the service interacts with customers. This project is not a service restructure; it is the re-designing of the service around the customer experience and ensuring we are excellent in the eyes of the public. We will refocus on providing excellent customer service by getting things right first time.

Whilst improving performance and clearing backlogs of work, our primary focus has been on the quantity and quality of work processed, we have improved performance against Performance Indicators. Having cleared substantial backlogs and delivered year on year improvements in performance, we now need to switch our focus to the customer, and look to improve the level of service we provide.

With everyone pulling in the same direction, we can make significant strides to improving the service for our customers and the job satisfaction for our staff. By involving staff and empowering them to drive the change process, we can become the best!

This is an opportunity for us all to work together and with the longer-term links to the wider social inclusion agenda; we have the chance to make a big difference in people's lives.

On a corporate level, all that we do must support the Council's ambition of being Diverse, Young, Green and Economically Strong. We have a particular role to play in supporting the economically strong element of the ambition

Strong links must also be made between the "customer first project" and existing projects (such as Local Housing Allowance). The "customer first project" will sit in the middle informing these other projects, both in terms of customer focus and project methodology. We are aiming for a seamless one service approach.

Customer feedback from the BVPI 80 user satisfaction survey, our customer exit survey, and the corporate customer feedback exercises, will form a basis for designing the way in which we deliver our service in the future..

Results from council wide feedback indicate that only 55% of staff feels that the council is customer focused – the aim is to continuously improve this. The council's leader says 'We must be seen as a four-star council in the eyes of our customer'. Our service must be sensitive to the customers we serve: equal citizens, different needs.

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We can only achieve these many more goals by placing our staff at the heart of the customer experience – giving them the freedom to exercise their judgement.

2. Overall Aims

The "customer first project" aims are to create…

1. A culture that puts our customers first and encourages everyone to continually work towards improving how we deliver the service to our customers – 'equal citizens, different needs'
2. Streamlined processes and decision making, which are both efficient and customer focussed – the aim being "one contact, one resolution"
3. An organisational structure led by all managers that supports the customer first culture and new processes
4. Staff confidence to make decisions by providing appropriate training and support.
5. Customers access to the service in the way they choose
6. Excellence in the eyes of the public (excellent customer experience)
7. Service designed around the customer experience which is locality sensitive
8. Improvements in quality.

2.1 Critical Success Factors

The success factors are developed to measure if the project aims have been achieved:
- Customer complaints
- Customer satisfaction surveys
- Customer exit surveys
- Staff surveys
- Increased job satisfaction (From PRD process)
- Potential for reducing staffing resources
- Revision of decisions decreased
- Improved Performance
- Reduced workloads
- Feedback from our stakeholders (Inc Councillors)
- CAA (Comprehensive Area Assessment)
- Recognition (Awards)

3. Strands to the project

The project will be split into five component parts or strands covering the following areas:
- Communication
- Business process re-engineering (BPR).
- Human resources (HR)
- Technology
- Training.

The Customer First Project Team will have independence and influence, confident in its ability to deliver and implement genuine improvements for the whole service.

The strands will be run as specific operational projects and all strands will have their own detailed plan and identify links with the other strands.

There will be an individual strand risk register and issues log which identify the links with the other strands.

4. Strand Objectives

4.1 Communication

Background

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The communication strand will underpin the whole project. The person responsible for communication will need to work closely with the other strand project managers to ensure we achieve a coordinated approach and give a consistent message to stakeholders.

We must ensure that we all know what is meant by customer focus, so we all understand the culture we are trying to create. Some preliminary work on customer focus across the service will help achieve this aim., drawing on the expertise that we have in the service (e.g. Chris Read – Customer Care and Quality Officer will be able to provide advice and guidance on publicity and communication)

Objectives

1. Develop, recommend, agree and deliver a 'Customer First project' communication plan covering all service stakeholders.
2. Develop and Implement strategies and contingencies to breakdown the resistance to change.
3. Ensure that documents produced/changed to support the 'Customer First' project are fit for purpose and in plain language.

4.2 Business Process Re-engineering (BPR)

Background

Our last major BPR exercise was carried out over 7 years ago. Despite incremental changes being made subsequently, we now need to refocus by putting the customer at the heart of everything we do - "Customer First".

The BPR process will be staff driven and not management driven.

BPR will cover all areas of the service (Council Tax, Benefits, Business Rates), including the links between revenues and benefits processing, e.g. liability and CTB. It will look to simplify current processes and cut out any processes or stages that result in unnecessary duplication, control and/or add no value to the process.

BPR will focus on achieving the best possible result for the customer. We are not looking to replicate what we have now, therefore, the current assumptions about, evidence gathering, verification, information collection, will be challenged.

Technology will have a big part to play in the project, and we need to ensure that the technology fits the process, not the process fits the technology. We are in effect starting with a blank piece of paper.

The BPR process will form a platform for future service development. Links will be drawn with other means tested benefits and to the possible additional uses for the data and information we hold (See social inclusion report).

Objectives

1. For all areas of the Service identify all access channels and map current practise.
2. Develop and implement simplified processes for the collection and processing of work for revenues and benefits.
3. Identify how best to deliver the service to the customer.

4.3 Human Resources – HR

Background

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Through workforce planning, the Council is aiming to have "succession plans" in place to ensure continuity. Recruitment will primarily be internal, with external recruitment only in cases where specific skills are required and internal recruitment has been unsuccessful.

The overall aim is to enable the Council to have a framework in place, which both equips staff with the necessary confidence and skills and encourages career progression across service boundaries.

Objectives

1. Develop, recommend, agree and deliver a HR plan for the project resources required to deliver the 'Customer First project' including backfilling relevant posts.
2. Develop, recommend, agree and deliver a HR plan covering all areas of the Service including the Service Workforce Plan and delivering the HR changes identified as required on the 'Customer First' Project.
3. Develop, recommend, agree and deliver a strategy for dealing with UNISON.

4.4 Technology

Background

Over the past couple of years, the service has received funding from the Department for Work and Pensions performance standard fund for both home working and mobile working. The following new technologies have been purchased:

- Anite mWorks - mobile
- Sx3's Kirona wireless solution, and
- Sidewinder - workforce scheduling/route planning module

The Service has also implemented home working and has 30 staff working at or from home, using both broadband and Citrix technology. Citrix technology is also being used to enable the remote scanning of documents at front line service points, including KIPs, LICs and Kirklees Neighbourhood Housing offices.

Emerging projects and technology

Projects OLIVE and Griffin, are both data matching projects aimed at streamlining the benefits application process by looking at passported claims for CTB, this will affect the level and type of work coming into benefits.

Funding has been allocated in the revenue budget to purchase Northgate's E-services/Assert product, which will enable further automation of processes.

Objectives

1. Develop, test and deliver the technology available/required to meet the BPR and HR strands of the 'Customer First' project.
2. Evaluate the longer term IT implications for Revenues and Benefits reporting recommendations, assessing value for money and the business case.

4.5 Training

Background
The training strand will ensure that staff are equipped with the necessary knowledge and skills to provide a seamless service to our customers. The aim being to give staff confidence to make decisions to do the right action, for the right person at the right time.

Objectives

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1. Arrange customer focus training for all staff
2. Arrange and develop LEAN or BPR training for all staff
3. Develop, recommend, agree and deliver a training plan for ' Customer First' Project Team resources.
4. Develop, recommend, agree and deliver a training programme for all relevant staff and stakeholders to ensure all strands of the project are delivered and fit for purpose.
5. Develop management information so that the 'Customer First' project can be monitored through implementation and as normal business.

5. Project Control

5.1 Customer First Project Board

Executive – Jane Brady
Senior User – Dave Thompson
Senior Supplier – Steve Bird
Quality Assurance – Graham Beckett
Project Manager – Steve Washington

5.2 Quality Assurance – Graham Beckett

Will include:
- Mid term project evaluation
- Post project evaluation
- To QA the whole project/process and benchmark with the top performing Revenues and Benefits services across the country.

5.3 The Customer First Project Team

Project manager – Steve Washington

Strand Managers:
    Communication – Chris Read and New Communications Officer
    Business process re-engineering (BPR) – Nicola Clayton.
    Human resources (HR) – Jacqui Wilson and Karen Lynch as support
    Technology – Carl Ainley
    Training – Sharon Cockroft
    Administration Support - Philip Radband

6. Reporting Arrangements

The Customer First Project Manager (with highlight reports and normal project documentation) will report to:

1. Project Board – 4 weekly basis
2. SDG – 4 weekly basis.

The home and mobile working project will be managed through the customer first project.

7. Resources for Project

Resources should be drawn from existing staff, with appropriate "back filling" arrangements being put in place to ensure business continuity.

Staff from all levels will be required to work on the project either on a full or part time basis.

Budget aside for the project, the board will need to identify what the project team will cost and the technology costs to develop accommodation, equipment, resources, etc.

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The Service Development budget for 08/09 should be identified for the project along with the unspent rollover in current year for e-services and revenues mobile working. Any shortfall should be met from rollover of under spend in 07/08

7.1 Resources Objectives

1. The project team will provide best estimates on the cost of resources
2. The project Team will provide best estimates for the cost of each project strand

8. Project Timescales

Suggestion time-scales for delivery of the project is to start from April 2008 and be developed over a 9 month period at which point the project will look to come to an end, however until more detailed plans are drawn up the final date will be unknown.
Changes will need to be bedded in to the service by the start of 2009/10 financial year.

9. Risks to the project

I have identified six high level risks to the project:
- Resistance to change
- Single status
- Increased cost of delivering the service
- Resources
- Impact on performance
- Commitment from Project Board

Steve Washington
Version 5 – 21st February 2008