Cabinet – 12 February 2020

Walsall Proud Programme – Enabling Technology supporting Customer Access Management to deliver Service Channel Management technology for the Customer Experience Centre

Portfolio: Councillor Bird, Leader of the Council

Related portfolios: All

Service: ICT, Resources and Transformation

Wards: All

Key decision: Yes

Forward plan: Yes

1. Aim

1.1   To compliantly procure and enter into contracts for a Service Channel Management (SCM) platform which will provide essential technology to support the Walsall Proud Programme – specifically a work stream known as Customer Access and Management.

2. Summary

2.1   This report should be read in conjunction with a separate report "Walsall Proud Programme – Customer Access Management". The separate report will provide Cabinet with a full update of progress being made on the Customer Access and Management work stream.

2.2   The Customer Access and Management work stream (CAM) is an integral part of the Walsall Proud Programme; the CAM work stream will deliver against the following objectives:

- Improve outcomes and customer experience
- Improve employee satisfaction and engagement
- Improve service efficiency and performance

2.3   Technology to support Walsall Proud Programme work streams is being delivered through our Proud work stream known as Enabling Technology. The Enabling Technology work stream is aligned to and cross-cutting all work streams within the Walsall Proud Programme and will strive to deliver technology solutions to timescale, budget and quality.

2.4   The Enabling Technology work stream has been actively working with CAM over the past 5 months to establish an approach to technology delivery options and

solutions to support the evolving Customer Experience Centre (CXC). The key solutions which are currently being specified as required are:

- Service Channel Management solution (SCM) – capability to handling incoming communications to the Customer Experience Centre via Telephone, Email and Social Media (outlined in this report).
- Customer Relationship Management solution (CRM) – capability to record information about customer contact and to maintain progress against customer requirements, via an integration solution with back office IT systems, enabling self-service opportunities for customers
- Business Insights (BI) – capability to analyse information from existing IT systems to build greater insight into our services and customers' requirements.
- Web site platform, functionality and content (CMS)
- An online payments system to support the new web site functionality currently being defined. A Payments Policy has been drafted for Cabinet consideration, which will assist in defining the new payments solution.

Overarching the key solutions will be the ability to seamlessly integrate applications and data.

2.5   Cabinet will be asked to either support approval of funding or award contracts for the above technologies over the course of the next 3-6 months.

2.6   The first key technology capability which the Customer Access and Management work stream requires the Enabling Technology work stream to deliver is a Service Channel Management "platform". Basic functionality to replace the current contact centre platform needs to be made available by 01 May 2020.

2.7   The current contact centre platform is end of life and is no longer fit for purpose; a like for like replacement is not an option as this would not provide any mechanisms for customers to transact either digitally or via social media.

2.8   The Service Channel Management (SCM) Platform will provide the Customer Experience Centre with the software required to handle customer contact across a number of communications channels including telephone calls, emails and social media contacts. The software will be cloud hosted for resilience and will manage the routing of inbound customer communications to the most appropriate Officer.

2.9   This is a key decision as the expenditure over the lifetime of the Service Channel Management contract will be significant; soft market testing has demonstrated likely values could exceed £500,000. The Customer Access and Management work stream and the underpinning Service Channel Management platform will have a positive impact on the delivery of council services across the borough.

3. Recommendations

3.1   That Cabinet delegate authority to the Executive Director of Resources and Transformation to award and enter into a contract for the provision of a Service Channel Management Platform following a compliant procurement process, for an initial term of two years with two optional 12 month extensions, via the Crown Commercial Service G-Cloud Framework Agreement and to subsequently

authorise the sealing, signing or variation of any deeds, contracts or other related documents for such services.

4. Report detail - Know

4.1 Customer Access and Management (CAM) was established as a key capability for the council's future Ways of Working at the outset of the Walsall PROUD Programme. The key CAM activities were then defined and designed in 2019, as part of the council's functional model setting out how council activities will be organised in the future ways of working.

4.2 The implementation of the next steps for CAM transformation commence on 06 January 2020. To support the next steps, the Enabling Technology work stream is required to deliver the foundation of a Service Channel Management platform in readiness for 01 May 2020; it should be noted that this milestone will not deliver the full SCM functionality – this will be built and integrated into other systems as the CAM work stream progresses.

4.3 Service Channel Management in its basic form is a telephony solution that is capable of delivering inbound and outbound customer communication across multiple channels – channels such as voice, email, SMS, chat, chat-bots and self-service. The SCM platform will support the development of the council's Customer Experience Centre (CXC).

4.4 Subject to market availability and In line with the ICT Strategy the new SCM platform will be cloud based (software as a service) and aligned to Microsoft technologies.

4.5 A new telephony platform would be required regardless of the Walsall Proud Programme as the current contact centre/telephony system is almost 20 years old, it is no longer fit for purpose.

4.6 The Customer Experience Centre will support the following Proud objectives:

- better use of resources (will be achieved by developing and training staff)
- automated recognition of customers (will be achieved by using identifiers such as phone number)
- pre-population of records with relevant customer data and notes, saving time and improving accuracy whilst remaining in compliance with GDPR
- detailed capture of workloads by service channel providing insights into types and volumes of contact per channel and service type
- adherence to Service Level Agreements and the capability to balance resource against demand levels

4.7 In order to achieve a delivery date for the SCM platform of 01 May 2020 a contract must be awarded to the successful bidder no later than 02 March 2020; due to timing and sequencing of the implementation plan and Cabinet timetable, approval is therefore sought under this report to delegate the award of a contract for a Service Channel Management platform to the Executive Director of Resources and Transformation, following the conclusion of a compliant procurement process.

4.8 The Walsall Proud Programme will require the Council and its Officers to work flexibly within its governing processes and procedures whilst also providing Cabinet with a high level of assurance of compliance with the Council's Contract Rules and the Public Contracts Regulations 2015.

5. Council Corporate Plan priorities

5.1 The Walsall Proud Programme is fundamental to the successful delivery of all priorities, particularly on improving our Customers experience, employee satisfaction and an internal focus on efficiency.

6. Risk management

6.1 Effective governance arrangements are in place for the Walsall Proud Programme to allow for successful delivery of the programme. These consist of Walsall Proud Programme Board, Commercial Group, Design Authority, Customer Access & Management Steering Group.

6.2 The Enabling Technology work stream are working closely with the Walsall Proud Programme, Procurement and Legal Services to ensure that procurement activity is carried out safely and in compliance with both the Public Contracts Regulations 2015 and the Council's Contract Rules.

7. Financial implications

7.1 On 18 December 2019 Cabinet approved a variation to the 2019/20 capital programme to include funding for this project. Any ongoing revenue implications, such as licences, will be funded from the financial saving delivered through the Customer Access Management work stream of the Proud programme.

8. Legal implications

8.1 The procurement will be carried out using the UK Government's G-Cloud Framework available to public sector organisations via the "UK Gov Digital Marketplace". The G-Cloud Framework has been used on a number of previous occasions to successfully award a number of contracts.

8.2 The legal implications of using the G-Cloud Framework means that the Council will be using a 'pre-procured' process and as such will accept the framework's terms and conditions of supply, ICT and Procurement will engage Legal Services where appropriate about the framework's terms and conditions and how to enter into a contract.

9. Procurement Implications/Social Value

9.1 Via the Enabling Technology work stream of the Proud Programme, ICT has worked closely with both PricewaterhouseCoopers (PwC) and the business areas drafting both the functional and technical requirements for the SCM platform.

9.2 ICT are working closely with the Corporate Procurement Team. The procurement exercise which the Council will be undertaking will be in accordance with the requirements of the Public Contracts Regulations 2015 and will give consideration

to social value in line with the Public Services (Social Value) Act 2012. It will be in compliance with the Council's Contract Rules.

9.3 The commercial advantages of using a compliant framework agreement are flexibility and reduced timescales of procurement procedures.

9.4 The G-Cloud selection process has indicated that there are 6 suppliers who may have the capability and capacity to deliver a Service Channel Management platform; these suppliers have been asked to express an interest in responding to the Council's Invitation to Tender.

9.5 The anticipated timeline through to contract award is detailed below:

- Issue Invitation to Tender - 13 January 2020
- Closing date for Tender returns – 05 February 2020
- Evaluation of responses - 06 February 2020 to 20 February 2020
- Contract Award – 02 March 2020
- Contract Mobilisation – 23 March 2020

10. Property implications

10.1 There will be property implications related to the Customer Access and Management work stream for example when the Customer Experience Centre is developed; the Customer Access and Management work stream will report any property implications to Cabinet.

11. Health and wellbeing implications

11.1 The technology that will be delivered by the Service Channel Management platform will support employees in delivering their day to day business and services and will enhance their time at work by simplifying and automating processes freeing them up to undertake work which will add value to the citizens of Walsall.

11.2 ICT endeavour to ensure that all new technology allows for end users individual and unique characteristics and requirements; for example deploying lighter weight or smaller equipment or equipment with larger displays, larger monitors, dual monitors, software to enlarge screen reading or to read aloud, different mouse/keyboard layouts, voice recording software, software configuration to enhance screen displays etc.

12. Staffing implications

12.1 There will be a requirement to train and upskill existing staff in the use and support of the new technology that will be introduced by the SCM platform.

12.2 Staffing implications outside of training are being addressed in the overarching Customer Access and Management work stream.

13. Reducing Inequalities

13.1   An Equality Impact Assessment reference 29/19 commenced on 29 July 2019 for the Customer Access and Management work stream, this will continue to be reviewed by the CAM Steering Group as necessary and considered as part of the decision making process.

13.2   A separate Equality Impact Assessment reference 55/19 is being carried out for the Enabling Technology work stream which will encompass "supportive technology".

13.3   The Council is currently undertaking a programme of work to ensure that services offered via the Council's website (digital services) comply with the Government Digital Standard (GDS) – this standard has 14 requirements which when implemented will give assurance that users with protected characteristics have the same opportunity as others to access online services. The GDS Service Standard can be viewed here https://www.gov.uk/service-manual/service-standard.

The GDS standards are:

- Understand users and their needs
- Solve a whole problem for users
- Provide a joined up experience across all channels
- Make the service simple to use
- Make sure everyone can use the service
- Have a multidisciplinary team
- Use agile ways of working
- Iterate and improve frequently
- Create a secure service which protects users' privacy
- Define what success looks like and publish performance datqa
- Choose the right tools and technology
- Make new source code open
- Use and contribute to open standards, common components and patterns
- Operate a reliable service

13.4   All invitations to tender for ICT solutions refer to the Council's Vision; this being *that Inequalities are reduced and all potential is maximised We are led by the communities we serve who help shape the services we provide and we help those communities to make a positive difference to their own lives through active civic engagement and co-operation.*

Suppliers are asked to respond to the following question; *How can your solution be adapted to support the Council in achieving its vision whilst also ensuring that users with protected characteristics (as defined in the Equality Act) are not disadvantaged.*

14. Consultation

14.1   Following Cabinet approval on 23 October 2019 to commence consultation/engagement to inform and shape future ways of working, the CAM Steering Group have completed consultation through Member workshops,

customer focus groups, operational workshops, manager workshops and an online survey. Feedback from this consultation is recorded in EqIA reference 29/19.

14.2 Further specific consultation regarding SCM technology will be carried out as required within EqIA reference 55/19.

15. Decide

15.1 Cabinet is requested to approve the recommendation made in section 3 of this report.

16. Respond

16.1 In the event that Cabinet delegate authority to award a contract to the Executive Director of Resources and Transformation ICT will continue to work closely with all stakeholders to ensure that the Service Channel Management platform is implemented as required by the Customer Access and Management work stream.

17. Review

17.1 Monitoring, review and reporting progress of the CAM work stream will continue to be undertaken through current Proud PMO governance procedures.

Background papers

CAM Cabinet Report
CAM Draft EqIA ref 29/19
SCM Draft EqIA ref 55/19

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