

# East Suffolk simplifies access to revenues and benefits

While working to merge two district councils, East Suffolk used customer-led testing to make it easier for residents to access revenues and benefits – delivering £65,280 of efficiency savings along the way.

## The issue and context

Following the merger of Suffolk Coastal and Waveney district councils in April 2019, East Suffolk is the country's biggest non-metropolitan district council, serving nearly 250,000 people.

Before the creation of the new East Suffolk Council, the two councils had a history of working closely together in their drive towards giving their residents cost-effective, efficient and high-quality services. They were one of the first councils to appoint a shared chief executive and have a fully integrated, shared workforce – helping them save more than £10 million since 2010.

In 2016 a new website was launched with improved functionality to conduct a range of transactions in response to user need. Phase two of this project, which set out to provide citizen services on a modern platform, then moved forward with work to develop a customer self-service portal so that customers could benefit from:

- access to services 24/7, 365 days a year
- pre-filled service request forms
- progress tracking
- full history of their enquiries and actions taken.

Revenues and benefits services for both councils are provided by the Anglia Revenues Partnership (ARP), which runs the council tax collection and housing benefits services for a number of councils in the area, including Breckland, East Cambridgeshire, Fenland, West Suffolk and the then Suffolk Coastal and Waveney.

“Suffolk Coastal and Waveney have worked together as a shared service for a long time and we enabled a single East Suffolk website in 2016. Since going live with that website we have been looking at ways of further developing our digital offering.”

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

As part of the new portal development, the ambition was to enable customers to access their revenues and benefits services – still separately administered by the ARP – alongside their other council services.

Funding from the LGA Digital Channel Shift Programme would be used to integrate the council-wide portal and ARP portal to enable the introduction of the one password sign-on facility for residents.

This work was seen as part of the councils' wider transformation programme, which would continue to develop their digital offering for residents and would complement the track record both councils had built up on delivering increased levels of self-service. The outcomes for their work on channel shift had included:

- reductions in footfall to the customer service centre
- increased use of the automated telephone line
- approximately 70 per cent of council tax payers paying by direct debit
- increased use of online payments.

### Digital Channel Shift Programme

The work at East Suffolk Council to support its innovative use of digital technology has been funded through the Digital Channel Shift Programme, which is managed and overseen by the Local Government Association (LGA).

The Digital Channel Shift Programme was set up to help councils and their partners to promote greater use of online tools and technologies for the benefit of both their customers and staff.

The aim is for the digital tools and solutions created through the programme to be reused by other councils and contribute to the wider work to transform local public services.

## The project objectives and targets

Suffolk Coastal and Waveney knew that a large percentage of enquiries coming into their customer services and frontline teams were about revenues and benefits. Queries related to council tax, non-domestic rates and benefits made up approximately 80 per cent of the volume of traffic.

At the start of the project the councils already had their new self-service portal up and running which allowed customers to access council services. ARP, meanwhile, had its own revenue and benefits self-service portal. However, the two websites had different passwords and log-ins and were not integrated.

This project would set up a single sign-on between the two sites so that customers could access revenue and benefits services from the council portal alongside all other services.

Previously if a customer was paying a council bill for example they would need to:

- navigate away from the council website to ARP's site and log in
- pay the bill via the Capita service portal
- if they wanted to register for other self-service tasks, they would need to revisit the council website and register an account.

The LGA funding would support the financial investment needed to integrate the councils' Firmstep self-service portal with ARP's Capita revenues and benefits system to achieve the single sign-on approach.

The new service would improve the customer journey as users would be able to easily find and view their own council tax bill and benefits information, sign up to e-billing and keep track

"This project joined up the revs and bens service to My East Suffolk – providing one sign-in so you can see your own bill, notifications and sign up to e-billing. It also has the potential knock-on effect of increasing the use of digital services across the council."

**Stuart Philpot, Strategic Manager (Support), Anglia Revenues Partnership**

"We were looking at customer service in general and expanding our digital offering so that we could free up customer services officers' time so they can spend more time with people who need it – and those who are able to interact online can do so. This project, funded by the LGA, was part of this drive."

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

of their dealings with the council in one place.

This would mean that:

- council tax and business rate payers could view balance details, transaction history, correspondence and opt to go paperless
- housing benefit claimants could see awards, payment details and correspondence and opt to go paperless
- housing benefit landlords could view housing benefit information, awards and payments.

Suffolk Coastal and Waveney expected that the creation of one sign-on – via the new East Suffolk Council site – would drive up online transactions, resulting in a reduction in telephone calls and visits. This would free up officers' time, which would be an efficiency saving, and would also give officers the time to concentrate on the more complex cases. It would also deliver savings in printing and postage costs through increased take-up of paperless billing. In addition, the e-forms would ensure that incoming data would be better structured and reduce the risk of error from rekeying.

### Targets

It was anticipated that 10 per cent of customers would register for paperless council tax billing and that 10,000 customers would register for a self-service account within three years – resulting in £40,281 of annual savings:

- £21,231 a year from officer time
- £19,050 a year from reduced postage and printing costs.

## The approach and progress to date

The single sign-on was to be developed in an existing Firmstep-based customer self-service platform and linked through to ARP's Capita revenues and benefits system.

The Firmstep and Capita systems would communicate via an application programming interface (API), enabling information entered by the citizen in an online form to be automatically recorded and updated in the back-office system.

The project team was made up of council staff from across customer and ICT teams, external suppliers and ARP's revenues and benefits staff.

### User testing

The councils placed great value on robust customer-led user testing – this element was seen as key to the project's success.

User experience (UX) testing had previously been conducted internally. However, this time the team wanted to test the new services with external customers – those who don't see council documents on a daily basis or work in the council environment.

A local UX company, The User Story, was selected to undertake the user testing, with the aim of transferring learning and experience from the exercise to internal teams – so that robust user-testing could subsequently be conducted in-house.

The User Story undertook user research to explore the user behaviour and the general usability of the website, including the 'one sign-on' to revenues and benefits.

"We wanted to use a company that was experienced in this field and could teach us so that we could go and do it for ourselves properly in the future – which is exactly what happened. We learnt how a UX session takes place, what we should be looking for. Culturally it changed the way we'll do UX testing in the future."

**Emma Cankovic, Customer Experience Manager, East Suffolk Council**

"I've done UX testing in the past with volunteers from across the council and you have different people from different departments. But essentially we're all council workers and 'indoctrinated' to look at the council's web pages in a certain way and we get used to reading something in a certain way – and actually what we think is obvious to an outside customer who has no understanding and doesn't see those documents or pages on a regular day-to-day basis may be completely different.

"Initially, we had a 'My Council Tax' button and everybody clicked on it assuming that they would find their own council tax information. Instead it took the user to the council's council tax page which gave a breakdown of all the different bandings, so the wording was changed to make it clearer. The team also made changes as they went along – moving icons, for example to take into account where a person's gaze is naturally drawn onto the screen.

"The user testing showed us that what we thought was great, actually wasn't so great and that navigation is everything. You can make some really simple changes to the navigation process which can revolutionise how your area works."

**Emma Cankovic, Customer Experience Manager, East Suffolk Council**

The research was to determine whether there were any navigational, presentational or content issues with the current online offer. The findings led to content being restructured to better signpost this 'sign-on' service and to make the log-in details more prominent.

Each tester was given one scenario – to log on and to try to set up a direct debit. This task was chosen as it is one of the top telephone requests to the customer service team and should be a simple online customer journey.

The testing was done on mobile phones, tablets and laptops and was filmed so that the user experience could be captured for review by the team. This was done in real-time with the web team and suppliers watching from an observation room. They were also able to make

iterative changes to the website in real-time so they could see how these influenced the next person's user experience.

Customer services recruited local residents to the testing exercise by running a social media campaign, displaying posters in libraries and contacting local organisations including disabilities user forums. A £20 shopping voucher was also offered as an incentive to take part.

The aim was to capture and assess the needs of a wide range of users including those from a variety of backgrounds, ages and digital abilities. There was only one criterion for being part of the test group and that was for the user to have a council tax account so that they could sign in, use the website properly and test the forms.

User testing took place over several days and at different times in order to reach as many different groups of people as possible and to accommodate childcare arrangements and work patterns.

The user testing was so successful it has changed the council's attitude to future user testing. The ARP was so impressed with the exercise that it is planning to undertake the same approach as part a review of its own website.

In addition to testing the new sign-on service, testers were asked to share on video why they had volunteered to take part in the research and to give their opinions on the importance of digital services.

One woman told a compelling story about her need to use online services which has subsequently been used by the customer service team to promote the real benefits of good online digital services to colleagues and other organisations. As a full-time carer for her disabled son, she relied on doing all her council business/transactions online – she did not have the time to interact with the council face-to-face or by phone during office hours. She needed a service that was flexible to meet her needs and that could be used when it was convenient to her. She had decided to take part in the testing to help shape the council's digital offering and make it as user-friendly as possible.

“We went live with Waveney in the December and then the following year – once we were a single council – we went live with East Suffolk. It was a decision we had to take, so had to amend the scope of the project. It was agreed with the LGA and it was the best outcome – and a longer-term gain.”

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

## Launch

The new service first went live in December 2017 for Waveney residents only, with the new East Suffolk service following in May 2019 after the merger of the two councils.

The difference in go-live dates was a result of the councils' decision to change the scope and timetable during the project. This followed the discovery of a technical difficulty in linking the councils' customer portal with the two separate databases that ARP was using to administer revenues and benefits services on behalf of each council.

To solve the problem would have been costly – and by that stage a proposal had been submitted to the Government to dissolve the two existing district councils and create a single 'super' district, East Suffolk District Council. The Government was 'minded to accept' the proposal and the parliamentary process to create the new council was about to begin.

Therefore, in order to continue progress, the project went live with Waveney as a pilot. The service would be later rolled out to residents of the former Suffolk Coastal District Council following creation of the new merged district and once Suffolk Coastal's revenue and

“The Waveney database was used to set up the single sign-on and the Suffolk coastal data was poured into the Waveney database to give the whole East Suffolk region all of the data it needed – and the single sign-on facility.”

**Stuart Philpot, Strategic Manager (Support), Anglia Revenues Partnership**

“Those who can and want to interact with us digitally can do so, and that’s a large percentage of our customers, but those who don’t we are still there for them – by telephone or face-to-face – and that isn’t going to change.”

**Emma Cankovic, Customer Experience Manager, East Suffolk Council**

benefits data had been put into the Waveney database to create one single system. This was a separate project, which took eight months and involved moving millions of pieces of data. The LGA agreed for this work to be carried out before completing work on the channel shift project.

## Promotion

Once the new ‘sign-on’ service was ready for use, the customer service team worked with the team to promote the new service for those who normally call or visit council offices – as a result of this promotional work, they are having around 160 sign-ups a month on average.

Council officers operating as floorwalkers encourage people to self-serve and register for the single sign-on and staff are happy to help them through the process on the public computers in the customer service centre. A wider publicity campaign is planned for later in 2019.

Those people who are not able to use a computer, or do not want to self-serve, will still be able to have face-to-face or telephone contact.

## The outcome – successes and challenges

**East Suffolk has delivered £65,280 in savings through the introduction of the new service and this is expected to grow following successful roll-out across the entire council area from April 2019.**

The financial benefits have been generated by freeing up customer service officers' time. This has enabled the council to deal with other responsibilities, including immigration work on behalf of the Home Office and supporting the council's homelessness team. Staff also have more time to help vulnerable customers and deal with more complex cases.

During, the first three months after the East Suffolk account went live (i.e. between April and June 2019) the self-serve option was accessed over 10,000 times. The registrations during the 2017/18 financial year were just over 9,000, meaning they were well on the way to exceeding their original target of 10,000 new customers registered within three years.

Council tax and benefits customers now have a seamless customer journey and are able to self-serve from any mobile device or PC at any time they choose, night or day. Applications for single person discounts, notifications of changes of address or requests to set up a direct debit are processed automatically directly into the back-office system, saving time and money.

### Financial benefits

The financial savings of £65,280 exceeded initial expectations due to a faster take-up, a drop in face-to-face visits and a reduction in the volume of calls.

"We have other services that need customer services attention, such as homelessness and we're taking on immigration duties as a result of some of the changes going on because of Brexit. By saving customer services time on enquiries that can be dealt with very easily online, we can do other things."

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

"At annual billing you have more than 120,000 bills going out in one week and that puts pressure on the numbers of telephone calls we receive. If people have signed up to My East Suffolk they can see their bill as soon as it is produced. You receive an email alert and can check your direct debits and see what the value is straight away."

**Stuart Philpot, Strategic Manager (Support), Anglia Revenues Partnership**

These savings have come from:

- overall reduction in workloads via channel shift, delivering savings in officers' time spent on handling customer contact valued at £30,036
- supporting the homelessness team with triaging cases, freeing up an additional officer, equivalent to £35,244.

The ARP also anticipate future savings with the take-up in e-billing. If the 10 per cent target for customers signed up to e-billing is reached, this will deliver savings of £19,050 per year in postage and print costs.

### Non-financial benefits

The new system has improved the way the council operates and staff time has been released. This has meant that the council has been able to take on extra responsibilities and has applied to become a registered Home Office Biometric Centre. In its new role it is helping local EU citizens complete the online process of applying to continue living in the UK after it leaves the European Union. It is also offering support to local businesses by taking the digital checking service on-site, useful for big companies who may have a high percentage of EU staff.

Additional staff capacity enabled a contact centre agent to support the council's homelessness team with triaging cases following a 12-week training course. Results of a review into the initiative revealed that the caseload of the homelessness team was

“The project is making savings for the council both in time, money and admin costs. And as people get used to and sign up for the digital option the opportunity for more savings will increase.”

**Stuart Philpot, Strategic Manager (Support), Anglia Revenues Partnership**

halved and it had a huge positive knock-on impact on staff morale. This model has received a lot of interest across the council.

Customers now have a more seamless service with one log-in, rather than several. This enables them to have an easier and simple interaction with the council and all its services, no matter who provides them.

They have a 24/7, 365 day-a-year service and whether it is a simple enquiry about checking a balance, or recording a change of address, they can do it at a time and place that suits them. And customers are logging onto the portal at all times of the day – someone even paid their council tax at 1.00 pm on Christmas day.

Landlords used to be queuing sometimes out of the customer service centre’s door – now they are going onto the portal and accessing their information straight away. Those queues are now a thing of the past.

## Challenges

**Engaging with suppliers:** the project team found that synchronizing four organisations, including two major suppliers, was difficult – particularly in the beginning as they all had busy and existing workloads. The team overcame this through increased use of remote working and meetings, as the geographical distance was an issue.

**Technical difficulties:** due to difficulties engaging with a supplier over a technical API issue, timing of the user testing was impacted, which led to a later go-live date. LGA support and advice helped to resolve this matter. In addition, the project was presented with the challenge of linking the councils’ customer portal with the two separate databases the ARP was using. The merger of the two councils helped solve this issue – at no extra cost, thanks to the team deciding to change the

scope of the project and stagger the go-live dates.

## Key learning points

**User testing:** customer-led testing is key and ensures that you have the right feedback. Testing should be done in real time with the suppliers and web team present, so that changes can be made quickly and tested during the next session. The success of this approach has changed the council's working practices and the ARP was so impressed that it plans to do similar user testing for its own website.

**Don't be afraid to use external help to add value to the project:** the council chose a UX consultancy to do its user testing. This not only achieved the best user testing possible but it also helped the team to gain the learning, experience and expertise that would enable them to do their own testing in the future.

**Use your collateral to sell your story:** the customer service team has since used the user testing videos (with the participants' explicit consent), recorded as part of the project, to sell the benefits of digital services. Good case studies are an effective communication tool, so if you have any, use them for future projects.

**Don't be afraid to make decisions that might change the scope of the project:** the project team started out thinking that the go-live date for the two councils was going to be the same. They changed the scope of the project as a result of a technical problem and the future merger of the two councils. This saved them money, time and kept the project on track.

"Don't be afraid to make a decision that actually changes the project. We had a technical problem which we had to overcome and we also knew the merger was going to happen. We could have spent a lot of money configuring the two databases but rightly decided to go live with one council and roll out the service to the other once we were one authority. You shouldn't be afraid of making those types of decision – for us it improved the project and saved us money."

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

"Keep the project moving. If you don't keep pushing software companies for what you want and have a clear vision of what you want, the project will simply fail.

"I cannot stress enough how important good communication is with your suppliers in order to ensure that you're getting their resource at the right time."

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

**Factor in strategic issues when making decisions:** the decision to merge Suffolk Coastal and Waveney district councils coincided with the lifespan of this project. The merger was completely outside of the project brief but was used to overcome a technical issue.

**Managing suppliers:** working with outside suppliers can sometimes be challenging and their sense of urgency may not be the same as yours. The project team found it difficult dealing with two different suppliers and getting 'both on the same page, at the same time'. Keep the project moving by having a clear vision, good communication and lots of forward planning is their advice, and manage suppliers closely and escalate issues early.

## Next steps

Following the success of user testing in this project, East Suffolk now plans to use this approach to testing for other projects to ensure that residents have more of a say in the services the council runs as it goes forward in its digital transformation journey. The ARP is also adopting the approach to changes it is making on its own website.

The service has been live across the region since April 2019 and over 10,000 people have already accessed the self-service portal, with little promotion by the council to date. There are now plans to roll out a wider publicity campaign to encourage further channel shift.

The ARP has set up a working group to take forward its vision of rolling out a single sign-on for each of the other councils in its partnership.

“The LGA project is complete. We’ve joined up the two customer self-serve portals but the wider programme of digital transformation is ongoing and will be for quite some time. It’s not something that probably will ever stop because the world is ever-changing in terms of digital and how people want to access services – and as a council we have to respond to that.”

**Sandra Lewis, Business Solutions Manager, East Suffolk Council**

## Contact for further information

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