

Parish Portal takes highways 'super customers' online

North Yorkshire County Council's in-house development team has built a parish portal to automate and streamline service requests from parish clerks regarding highways defects and enable them to access real-time information on subsequent progress and repairs.

The issue and context

North Yorkshire County Council's 731 parish councils are passionate about resolving highways issues for their communities. Potholes and other road defects are highly visible and account for a significant number of complaints from residents.

North Yorkshire views parish clerks as 'super customers' as the average customer may only report something once or twice a year and may not always be interested in the details of what happened to that report. However, the parish clerks log numerous service requests and, as part of local democracy, report back to their parishioners and therefore need additional information.

In the past much of the communication from, and with, parish clerks was via email. After every parish council meeting the clerk would send the highways customer communication officer an email with up to twenty or more service requests and expect a response to each of them. The highways team had to raise separate cases for every request, allow time for inspections and actions to be completed before

"It could take up to 20 working days to collate all the information and get the response back to them by which point they were rapidly approaching their next parish council meeting and pushing for a response to our email. So it was a bit of a vicious circle."

Deborah Flowers, Highways Lead

"We see our parish clerks as our super customers and we weren't delivering a good level of service to them. This was causing frustration because it was taking so long for them to get a response to anything they were asking us and actually it was becoming a quite administrative heavy load to deal with the sheer volumes of reports that the parish clerks were making."

Deborah Flowers, Highways Lead

capturing that information and feeding back to the parish council. This process could take up to 20 working days, by which point the next parish council meeting would be on the horizon.

In addition, North Yorkshire was receiving multiple reports about the same defect from parish clerks and citizens and had no way of feeding back quickly to parish clerks when things were due to be fixed – or if not, why not. To complicate matters further, local area names often varied from names in the council's gazetteer and highways inspectors often had to visit an area just to try and locate a reported defect.

The council was receiving approximately 6,000 emails every year and it felt that there was a significant opportunity to shift these service requests to an online channel, improve the communication between highways and parish clerks, and reduce the administration burden created by the current inefficient process.

Digital Channel Shift Programme

The work at North Yorkshire County 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.

During consultations with North Yorkshire's parish councillors and parish clerks about the county's work on its existing main customer portal, it became clear that the parishes wanted to improve the way they reported highways issues to the council and the council wanted to reduce duplication through repeat reporting of the same highways issues and faults.

North Yorkshire therefore planned to build a new parish portal, reusing skills and modules developed for its existing, successful customer portal, to better meet the needs of both parish clerks and staff in reporting and repairing highways defects.

The council wanted to harness innovative User Experience Design (UX) techniques to ensure that the portal was easy to use and would be adopted and used by parish councils – ie deliver channel shift. To this end it applied to the LGA Channel Shift Programme for support in building UX skills across its in-house development team.

The project objectives and targets

North Yorkshire has invested in and developed a successful approach to channel migration via its main customer portal. Through extensive engagement with its customers and communities it has established a requirement for different functionality based on the needs of different audiences.

They believe that they can reuse and enhance overall portal functionality to address these needs and, as a result of this approach, increase levels of channel shift both with those who are already online – getting them to carry out more of their business with the council online – as well as convert some of those not yet using online services to do so.

In the project to create a specific parish portal North Yorkshire believed that focusing on the need of a specific customer group – parish council clerks and councillors – would subsequently enable further enhancements back into the main customer portal.

The parish portal has three elements:

1. An online reporting and issue tracking tool with new mapping technology.
2. A unique approach to driving use of online reporting.
3. A method of transforming back-office processes and realising savings.

The new online reporting and issue tracking tool includes mapping technology and the functionality to upload photos and view notes from the highways inspectors. Parish councillors and clerks are able to see all transactions with the county's highways service on a map showing all reports and the status of issues they reported in the following areas:

- street lighting defects
- road condition issues
- potholes
- flooding incidents
- pavement issues
- overgrown vegetation
- 13 types of highways defects.

“We struggled with customer journeys and UX through different supplier portals, so we took the decision to develop our own approach. The decision was taken to see how best we could achieve that. We were fortunate enough to have our own development team and, as we developed the main customer portal, it gave us the ability to transition that same development over to other market segments [like the parish portal] at very low cost.”

**Robert Ling, Assistant Director
Technology & Change**

The portal integrates into back-office systems and therefore reduces double-keying and speeds up the time taken to resolve issues. Parishes are able to report issues on their smartphone or other mobile device, meaning that someone could walk up to a pothole, photograph it and report it – but crucially before they took the photograph they would be able to see if that pothole had already been reported and when it was scheduled to be repaired.

As a result of introducing the reporting and mapping functionality on the parish portal and the integration into the back-office Highways system, North Yorkshire planned to reduce the use of face-to-face and telephone channels contacts by:

- providing customers with the ability to pinpoint faults on an online map thus reducing the need for an additional phone call
- providing one single view of all the faults logged in a geographical area to reduce multiple reporting of the same incidents face-to-face and by phone
- developing issue-tracking functionality so that clerks and councillors did not have to call their local highways office to find out what was happening
- designing technology that people wanted to use, guided by customer views on look and feel

- ensuring that staff in the customer resolution centre coached people on using the new channel
- turning off the internal email link between the customer resolution centre and the highways back-office team
- demonstrating to people quicker resolution of highways issues through a communications strategy.

The goal was to increase levels of online self-service by parish councils through:

- co-designing web forms and maps with parish clerks and councillors so that they felt comfortable using them
- working with parish clerks and councillors on their priorities for new functionality such as uploading photos, making the portal relevant to their needs
- using staff in the customer resolution centre to coach clerks and councillors in using the portal.

The project aimed to:

- improve the quality of customer service in highways area offices
- increase the productivity of highways staff who would use the time released to communicate the county's plans to improve streets and roads in villages to parishes and so reduce spot reporting of potholes and other issues
- achieve quicker response times through providing more accurate defect reporting using geographic reference points (particularly important in rural areas with limited spatial reference points)
- save inspection time by enabling photographs to be uploaded and a service request to be visualised
- save time for parish clerks by simplifying processes and improving productivity
- build a relationship of greater trust between parish councils and highways teams.

A beta of the parish portal went live in June 2017 and North Yorkshire was looking to engage users to further improve the service,

maximise benefits and reduce the digital divide between key users and the county council.

The team intended to use the latest software and UX design techniques to do this. To this end they planned to build a highly skilled UX capability in-house before engaging with the parish councils to understand their needs and further requirements regarding additional online reporting. There was also a comprehensive plan to market availability of the new portal to drive take-up and deliver channel shift.

Targets

The project team set itself a number of targets from the introduction of the parish portal:

- reduce the volume of highways enquiries from the 731 parish councils by 50 per cent
- reduce duplicate and repeat reporting and highways area office administration time on parish requests equal to one FTE a year (specifically 550 hours of business support, 650 hours of highways customer communication officer time)
- increase the productivity of 32 frontline operational staff by seven per cent through improving the accuracy of defect location reporting by capturing a geographic reference point.

The approach and progress to date

North Yorkshire already had a successful solution available in its in-house developed and deployed online customer portal. End-to-end digital services had already been built for key services and the portal was fully integrated with relevant transactional systems.

As part of its in-house development policy the portal had specifically been built to be reusable for other customer segment portals, such as the proposed parish portal.

The business change and solutions teams therefore worked together with the service area to identify issues before looking at solutions based around the portal capability. This user needs focus was then deployed with the parishes, engaging with both councillors and clerks through working groups and mapping the user need and requirements – what was essential, what was nice to have and what they did not want.

During this process it became apparent that the parishes needed more information about the decision-making process and progress of cases than the general public, and than what was currently available to them. It also increased the focus around mobile devices and tablets because parish clerks are not always sat at a computer or laptop.

Agile approach

Whilst the software development teams were already confident users of agile methodologies, this was the first time that an agile approach to project management had been taken. Some

“Agile is a successful way to run a project. It worked really well for the parish portal because we were continually wanting to engage with the users and having that output at certain points enabled us to get their feedback.”

Emma Jane Lickiss, Project Manager

“We are not wedded to agile or waterfall – we use both and apply the right style to the right project.”

**Robert Ling, Assistant Director
Technology & Change**

agile training was given to the project management and service teams that was very well received. The resulting enthusiasm meant that the agile working process “was an easy one to follow”.

The team met daily with key people and talked through what was going well, what was not, and the next steps. This was a continual process – reviewing and making sure developments worked and, if they did not, how they could be revised to get it right. This constant dialogue was helpful in pushing the project through and reacting to issues. It also helped support the iterative product approach and rapid prototyping, enabling the team to go out and show parish users what developments and changes looked like, gain feedback and then tweak.

This agile approach and constant user engagement and feedback was helpful in keeping the parish users engaged during the process.

However, the council is clear that agile is not the answer for all technology projects, and it uses a mix of both agile and waterfall methodologies as appropriate. An agile approach¹ encourages teams to build quickly, test what they have built and iterate their work based on regular feedback, while waterfall is a sequential software development process that follows defined phases.

In-house development

North Yorkshire has long had a strategic focus on investing in in-house development capability and related skills. The customer and parish portals were built by in-house developers in the

¹ For more information, see <https://www.gov.uk/service-manual/agile-delivery>

Drupal open source content management framework (written in PHP scripting language and distributed under the GNU General Public License). Developers used the Leaflet open source JavaScript library to build web mapping capability. Microsoft BizTalk was used to integrate the portal with a Lagan customer relationship management system that had previously been back-end integrated with an existing Symology highways asset management and streetworks solution – which in turn uses the council’s street and local land and property gazetteers for location information.

A good example of the flexibility of the in-house approach is the addition during the project of a capability to upload pictures to help inspectors locate and assess service requests. This has been useful in reducing inspections for ‘obvious’ issues such as foliage obstructing a sign. And in line with the council’s ‘develop, improve, reuse’ approach this functionality can be reused for other transactions where photos are important in both the parish and main customer portals.

User engagement

Parish councillors and clerks were engaged throughout the build of the beta portal, including initial customer engagement to draw up key requirements and sign off initial prototypes. A highways communication officer and a customer service colleague attended multiple parish council meetings and wider meetings

“We’ve asked for them to send pictures as a picture paints a thousand words and, equally, in some of the more rural areas what they recognise as the area may not be recognised on our mapping system. So we have this incompatibility sometimes where we couldn’t always find the location and we were having to go back to clarify that. The photographs often identify the location much better.

“If it’s something obvious like foliage obstructing a sign, we wouldn’t even need to carry out an inspection, we could raise the works order to cut back the vegetation without visiting the site.”

Deborah Flowers, Highways Lead

“The parish clerks think it is so much simpler to have everything in one place and not to have to remember to chase someone for an email response because they have that up-to-date information in their account history screen. They own it, they like to grant and take access away from anybody and they enjoy the fact it’s all quick and so interactive and by looking at the interactive app on the report pages they can also tell whether faults have been identified by the highways officer or reported by another individual.”

Deborah Flowers, Highways Lead

during the project to demonstrate the new portal, promote uptake and create a forum to answer questions around the service. The highways team were heavily involved in leading the engagement sessions and with communications during the project lifecycle.

One example of changes made during the development stage in response to this user engagement was a request to be able to see the actual comments of the highways officer rather than a system-generated email. This capability was built into the system – today, any information the highways officer puts on the notes when he or she closes the case down or raises a works order is pushed back through to the parish council.

During the initial sessions with parishes, post go-live to promote initial take-up, it became clear that not all 731 parish councils were active. The target group was therefore revised to the 530 active councils.

A comprehensive communications plan incorporated awareness-raising by direct email,

“One of the biggest wins has been the response from members, who have to go to the parish councils and explain at times why things haven’t been fixed as speedily as they like or need to understand how many problems there have been in those areas. Being able to pull together the information in one area and speed up that process has been a big benefit.”

**Robert Ling, Assistant Director
Technology & Change**

“All the investment is in ourselves. We didn’t want to go out and ask the supplier to build something for us that only they could use. We wanted to develop the skills in-house. It was an investment up front but now it’s paying itself back in terms of a business model.”

Anne-Louise Arkle, Product Manager

engagement sessions, workshops and one-to-one work with parishes where required. Storyboards were used to take parishes through the process of setting up an account and reporting an issue, for example reporting a pothole as can be seen in the illustration later in this case study.

User Experience Design (UX)

The council had identified a problem with keeping customer journeys and the user experience consistent with multiple supplier portal offerings, which led to the in-house portal development and an increasing focus on UX.

The wider project team and software developers were given high-level training by QA (a specialist provider) on how to design web forms using a new methodology that has been proven to encourage take-up of services online – User Experience Design (UX). This approach is used by leading organisations like Sky Digital, Virgin and the BBC to design web services for customers that are engaging and encourage more interaction and transacting. For example, the BBC iPlayer was designed using this technique. This methodology is new to most councils.

Moving to a customer design approach is a change in mindset that involved ‘getting everybody on board’ from the developers to the business change teams and the service managers and staff. The training was very successful and put a clear focus across the project on the importance of front-end design and understanding of customer interactions, and how they could target different ‘personas’ for different services.

The team is clear that the opportunity provided by the LGA to invest in in-house UX skills was important not only to the success of the project

but was an investment that would have ongoing benefits in continuously improving and developing digital services in the future.

Business intelligence & analytics

Staff use a dedicated dashboard created by the council’s business intelligence team to show which parish councils are using the portal and which are yet to log in. Following engagement sessions, the dashboard information was used to target the ‘hard to reach’ councils who are not using the portal, including those who are ‘inactive users’ with an account. These parishes were then contacted to establish why they have not yet reported a fault on the portal and what barriers they were encountering in using the portal.

The team are also heavy users of Google Analytics to ensure that usage and online customer journeys are analysed constantly for opportunities to improve.

Go-live

The parish portal was launched on 16 June 2017. That month 132 parish users registered. In December 2018 there were 363 users of the portal and over 4,000 service requests had been received via the service. Service request communications now go from the parish to the highways officer and back to the parish automatically – replacing the historical ‘email to business support, hand on to colleague on Symology, hand on to a highways officer, then hand back to a comms officer who then emails back to the parish’.

“I’m loving the new Parish Portal. The best asset is that you can completely accurately locate the problem and so highways find the issue much easier and resolve it quicker.

“There are no problems logging on or registering onto the service. The forms couldn’t be easier and I really appreciate the new facility to name the report.

“I’ve just noticed today that the ‘View Transaction’ is now working which is brilliant and something I’ve been asking for.”

A parish council clerk

Project Milestones	Planned	Actual	Comments
User engagement in design/discovery phase	Jan-Mar 17	Jan-Mar 17	Parish councils engaged in original design and throughout build – initial prototype tested with parish reps and final beta again before beta launch
Beta launch – technical testing completed as part of this	May 17	Jun 17	Slight delay due to resource availability
Beta phase	Jun-Sep 17	Jun-Dec 17	Sessions held with parishes to promote initial take-up in terms of usage. Initial sign-up target was 50 per cent and 43 per cent was achieved – 251 from 580 active parishes (NB numbers adjusted as not all parishes have active parish councils)
Three-month review	Oct 17	Nov 17	Benefits assessed and actions agreed – including need for ongoing comms plan and an expert review because of the delay to the UX training
Expert review by internal UX lead	Additional task	Sep-Oct 17	Expert review completed by UX lead – quick wins implemented around wording, FAQs, etc. – development work scoped – areas for UX testing identified and agreed
External supplier QA commences work	Nov 17	Jan 18 – training complete	Delay in mobilisation of supplier – additional activity (UX review) built in to ensure benefits could be achieved
Development work post UX expert review	Dec 17	Jan 18	
User testing with parishes	Nov-Dec 17	Jan 18	This work had been scoped as part of UX review
Communications plan – update	Jan-Feb 18	Ongoing	Ongoing comms to ensure the county continues to promote the service and improve uptake

Storyboard: Reporting a pothole

The storyboard consists of 10 panels arranged in two rows of five. Each panel features a character named Beryl, a parish councillor, and a text box describing a step in the process of reporting a pothole.

- Panel 1:** Beryl is shown. Text: "I'm Beryl. I'm a parish councillor. I have access to our Parish Portal for logging and viewing highway issues."
- Panel 2:** Beryl is shown with a magnifying glass over a road with a pothole. Text: "I have noticed a large pot-hole at the crossroads in the village that's causing drivers some bother."
- Panel 3:** A hand holds a smartphone taking a photo of a pothole. Text: "I have taken a photograph of the pothole with my smartphone to upload to the Parish Portal later."
- Panel 4:** A laptop screen shows the "Parish Portal" login page. Text: "Back at home I log into the Parish Portal. The portal knows who I am and my location from my account details."
- Panel 5:** A laptop screen shows the "Parish Portal" interface with a mouse cursor over a button. Text: "I click on the option for logging a pothole issue."
- Panel 6:** A laptop screen shows a map interface. Text: "The mapping facility enables me to log the pot-hole issue accurately and to see if anyone else has logged it already. If they have, I don't need to log it again."
- Panel 7:** Beryl is shown with a magnifying glass over a map on a laptop. Text: "I can place a marker on the map where the pothole is and this gets recorded."
- Panel 8:** A laptop screen shows a form with a photo and text. Text: "I upload my photograph and attach it to the pothole issue request, check the details..."
- Panel 9:** A laptop screen shows a confirmation message: "Request submitted". Text: "...and submit my request."
- Panel 10:** Beryl is shown with a magnifying glass over an email on a laptop. Text: "I receive an email, confirming the logging of my pothole issue."

The outcome – successes and challenges

“We had an instance where a parish had raised an issue, there was a highways engineer in the area and literally within an hour he had inspected it and reported back. The parish even disputed the response as it was so quick. To go from 20 days to an hour they thought there was something wrong!”

Anne-Louise Arkle, Product Manager

At launch the portal was very well received by parishes, highways and customer services staff alike. It achieved significant take-up thanks to the prior engagement work with parishes, with 132 registering in the first month, ie just under 23 per cent of active parishes. By the end of 2018 there were 363 parish users, or 62.5 per cent of the target audience, with ongoing efforts to reach 80 per cent uptake.

Feedback from users has been extremely positive and over 4,000 service requests have been made, tracked and resolved via the portal to date, reducing the previous significant administration burden on highways and customer services teams.

Whilst keen to acknowledge the project's success, the project management, product development and highways service teams are all keen to point to North Yorkshire's approach of continuous improvement and engagement with users. The message is that this is not a project that will ever be 'done' as there is a strong culture of iteration and improvement.

Feedback from parish users has been particularly encouraging, as has their response to the constant improvement approach. Ideas for improvements flow between council and users in regular engagement sessions.

In practical terms the historical 20-day response time to parish clerk service requests and queries has reduced to a targeted five days. However, as highways officers have constant access to requests via mobile devices, there have been numerous instances of response within an hour due to the officer being in the right place, at the right time and able to resolve the issue.

“It's been a real revelation to some of the highways officers because it has allowed them to have a direct conversation with the parish clerks and build that relationship but equally parish clerks have said that I may not agree with why you've done it but I can't argue with the fact he was there on Wednesday at 10.00 am and this is what he saw. That element has been a real success.”

Deborah Flowers, Highways Lead

This shift to the portal has significantly reduced calls and emails to highways offices and reduced admin. Meanwhile visibility of existing reports and mapping facilities has led to a marked reduction in duplicated cases.

County, district and parish councillors have welcomed the transparency of being able to see in real time what has happened about a reported defect or pothole and the time saved in having to investigate and collate information.

The parish clerks are finding it much simpler to have everything in one place and not to have to remember to chase highways before council meetings for an email response to previous queries – all that information is up-to-date in their account history screen including the embedded highways officer notes.

Giving the clerks ownership of the information has been successful in improving relationships between highways and parishes. Clerks and highways officers are now in direct conversation over issues such as potholes impacting the local community – they may not always agree on the decisions and outcomes but the transparency of the process and direct communication has transformed relationships.

“Some of the attendees at the feedback sessions were clerks from multiple parishes. You couldn't have paid them for better feedback – it was superb. In terms of the accessibility and for reporting off it.”

Nigel Fowler, Contact Centre Support Advisor

Financial benefits

North Yorkshire has identified financial savings from reducing the admin burden on highways and customer services staff of £58,311 in the 2018/19 financial year, growing to just over £100,000 in the following financial year.

As requests can now be submitted directly to the parish portal each request completed in this way avoids an email which would formerly have been necessary. This avoidance of email contact has resulted in an administrative efficiency of £5,766 over the course of the financial year 2018/19. Further administrative savings have been made as the functionality on the parish portal has been made available directly to customers. Formerly there would have been internal communication between the highways officers and customer communication officers to provide updates to be passed on to the customer. Now this is no longer required an administrative saving of £2,998 has been identified.

Reduction of duplicated and time-consuming reports and clarification through the upload of photographs has also saved significant inspection time. The average cost of a highways default inspection is £50. Experience with the new process suggests that one in five service requests with attached photographs will now not require an inspection. Based on current data and projected trends, estimated annual savings from photo upload from the parish clerks have been quantified as:

- 2018/19: £7,496
- 2019/20: £17,450

This figure assumes that 40 per cent of the service requests have photos attached in 2018/19 and in 2019/20 that this rises to 60 per cent.

Photos submitted by customers are also expected to deliver efficiencies:

- 2018/19: £23,800
- 2019/20: £53,200

In this case it is assumed that 13 per cent of requests will have photos attached in 2018/19 based on photos submitted by customers to date. This is expected to rise to 20 per cent in

2018/19 following the current increasing trend. In both cases it is assumed that 1 in 5 photos are good enough to avoid an inspection.

The improvements in the data quality driven by use of the parish portal has improved the operational productivity of highways officers. This means that they can carry out one further inspection each day compared to before the parish portal was introduced. This is quantified as £18,250.

Non-financial benefits

For the council

- Highways officers report that there has been a significant culture shift from the parish clerks, advising that they have not seen lists of service requests in their email inbox (previously submitted by the clerks) since the portal was launched.
- Indeed, feedback from staff in the highways service is that they have a much improved internal user experience through the ability to deal with issues more efficiently, access to better information via the use of photos, and the ability to pinpoint location on a map.
- Contact from parish and county councillors requesting update information has reduced and feedback from these councillors is highly complimentary of the ability to access accurate information in real time.
- Highways officer and admin time saved from use of the portal has freed up capacity to deal with non-prioritised workloads and future planning for highways improvement.
- Development of the parish portal has played a key part in achieving a higher level of engagement in reviews of the Highway Maintenance Efficiency Programme and helped secure additional funding. For example, it has helped the council to meet the requirements for positive engagement with customers for grants provided by the Department for Transport.

For parish clerk customers

- Parish clerks have seen a significant improvement in response times to defect reports and in getting issues fixed for their communities.
- They have a simplified and automated process that has removed the admin burden for these valuable volunteer roles.
- A closer relationship with the highways service has led to an increase in mutual trust and a culture of collaboration.
- Clerks have been able to serve their communities better by being able to rapidly action issues and feed back real-time information on highways issues.

Challenges

As with all long-term projects the team encountered – and successfully overcame – a number of challenges along the way.

Dealing with experts: in the initial user engagement and UX design the team encountered a common issue – service areas are experts in what they do and there can be resistance to the thought of change or challenge around ‘who knows what’s best for our customers’. The team identified that breaking down cultural barriers was essential and spent significant time at the outset in demonstrating/highlighting visually the improvements that could be gained for both the service and its customers. This problem was resolved early on and resulted in a close working multi-disciplinary team.

Reconciling wants and needs: from a project management perspective a key challenge was reconciling the different wants and needs of users who interact with the portal processes at various points. Gaining consensus on actual ‘needs’ versus ‘wants’ early on was essential in the development of the portal.

Avoiding technical jargon: during development the team identified a risk that information input by engineers that would be visible to parishes via the portal might include ‘technical jargon’ rather than plain English. It was felt that it was important to make this

“One of the key problems, and this is not just for the parish portal, is working with other service areas. The service areas are experts in what they do and they can be very precious about it – it’s their service and they know what’s best for their customers. There was that initial rub and breaking down some of barriers are key. We were able turn that round as we were able to demonstrate visually what we were designing and how it would improve the service – and as a result they quickly came on board. To overcome this we used a lot of visual prototyping. We use storyboards so they see how this going to look and feel. And we already had the customer portal so they already had a product they could see and understand how it would work as a parish portal.”

Anne-Louise Arkle, Product Manager

language as simple and accessible as possible if the portal was to be a success and be adopted by parishes. The highways customer communication officer visited all highways area offices to engage staff and explain the need to keep comments on cases simple, jargon-free and customer-focused. Random quality-checking of officers’ comments and notes added to cases is ongoing with feedback and reminders to relevant engineers/highways officers of the importance of using plain English that is accessible for users.

Usability of different mobile devices: the UX approach unveiled significant challenges on the usability of different mobile devices in a large rural and urban county. The team invested significant UX resource in ensuring that all permutations of device and access were covered in the final portal.

Fear of new technology: as parish councillors

“Key challenges from a project management perspective were the different wants and needs so actually clarifying what it was that people wanted and what they actually needed was different depending on what area they worked in or location they were working in.”

Emma Jane Lickiss, Project Manager

are generally older than the wider population, the customer support team stepped in to help a number of clerks become familiar with the new service. The majority of issues revolved around missing postcodes, which was subsequently fixed by the development team working with the Land and Property Gazetteer team. In addition, the upload of photos helped pinpoint locations. Another issue was people forgetting passwords and being fearful of new technology. Support advisers were able to 'walk people through' the process until it became familiar and a video was produced to explain the change.

Adding photos to service requests: the addition of photos to service requests was seen as 'easy' by users but created challenges for the team in ensuring that uploaded photographs were correctly pushed through to the back-office highways systems. The underlying complexity of what appear to be simple requests can pose technical challenges – however these were successfully resolved.

Procurement delays: delays in procuring UX training due to council procurement processes and securing in-house development time were also encountered at stages during the project. These impacted delivery of some milestones but the team re-focused to manage these delays and delivered the project within target timescales.

Key learning points

Customer engagement: a key learning point from the team is “always keep the customer engaged”. Despite the upfront effort it makes delivery much easier and delivers a much better project that is fit-for-purpose for all users.

Agile: the team is enthusiastic about the benefits of learning and adopting an agile approach to project management and product development. “The continual discussion and dialogue creates good learning, the ability to bounce ideas off each other and is actually a lot quicker in terms of turning things around because you have contact with the right people at the right time every day.”

Timing: the main part of the product development was conducted over the summer months when highways service experts have more available time. The team believes this was a key factor in being able to meet the project’s delivery timescales and recommends thinking about the availability and capacity of service users to commit time to projects in relation to their day-to-day workloads.

UX training: tailoring and procuring UX training to meet the team’s needs and roles took longer than anticipated as “it is hard to know exactly what you need when you don’t

“The staff that went on the training were really impressed that we were able to get that quality of training and it geed up the wider team to thinking actually this is really important to us. The trainer was phenomenal and that had a huge impact across the teams and we learnt a lot about customer-centric design.

“Essentially it is about working collaboratively. Go out and speak to the parishes, ask them what they need, what would be useful and really define those requirements and do that design upfront. This enabled us to build something and not waste time in development.”

Anne-Louise Arkle, Product Manager

“We did the project over the summer months when our service experts have more available time. That’s worth thinking about as they have less time in the winter – and might not have been able to be so engaged in the project.”

Emma Jane Lickiss, Project Manager

have the expertise already in-house”. The team believes that they would have benefited from more time and involvement from a trusted UX expert and would advise such an approach to others.

Engagement: whilst good UX design may make the site more user-friendly for users this may only appeal to people prepared to use this channel and ensure that they continue to use it. Effort still needs to be made to engage with people to make the initial move to online channels.

Sharing learning: the team is focusing on sharing learning from the project internally and with other councils in three key areas: how to change back-office processes including what techniques to use; how to develop software and end-user systems that drive usage through visual appeal to people; and how to persuade councillors at all levels to invest in technology and change.

Next steps

North Yorkshire County Council considers the project hugely successful on many levels. It has been well received by users, has significantly streamlined processes and communications, and it has enabled skills development within the council.

Learning and experience gained during the project has subsequently accelerated build of a new commercial portal. This works in a very similar way to the parish portal and has a lot of the same requirements for the type of super customer who needs to see and raise multiple service requests with the council. The innovation developed during the creation of the parish portal has been reused to meet these needs.

Agile experience and UX investment have both helped to take in-house capabilities to a higher level. These are being reused on a multitude of projects across the council, including development of a new Blue Badge application service. The next step in this path is to apply this learning to development of online adult social service assessments and, importantly, to internal processes.

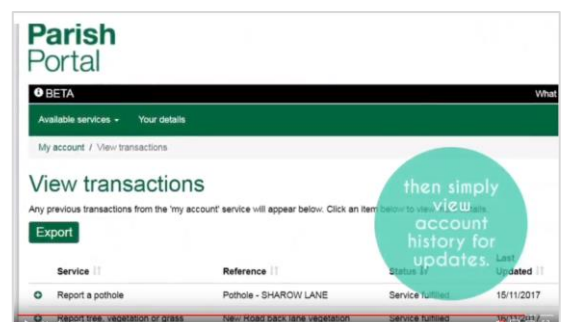
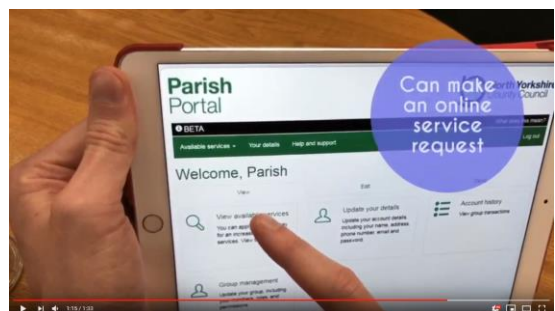
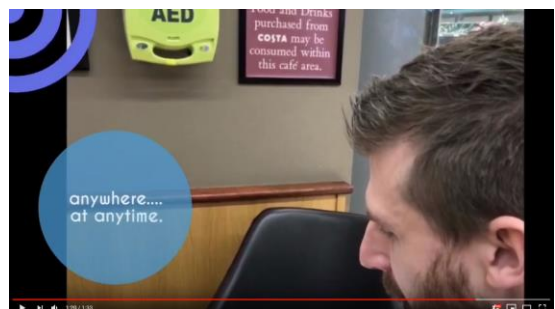
Customer services followed development of the parish portal closely – with a view to reusing the capabilities developed during the project in the main customer portal which is available to people in North Yorkshire. For example, access to highways inspector notes in response to service requests would be beneficial for

“I was interested in the work that was done to develop the parish portal because it was all about bringing inspector information as close as possible to the parishes. This was something we then reused as part of the customer approach because we were finding that level of detail was what customers were wanting – they weren’t just wanting standard responses. Also, we developed the ability for the parish to upload a photograph to evidence the incident or fault and that again was something we then included within the customer portal.”

Sarah Foley, Head of Contact Centre

Outreach video

The team has produced a video to help parishes make the shift to online – see the screen shots below, or view the full video: <https://www.youtube.com/watch?v=IYRgGmVjhb0>



customers. In addition, the customer services team was keen to add the ability to upload a photograph as evidence of an incident or fault to the main customer portal.

Use of analytics has been invaluable to the project and the UX approach. This capability is currently being built on to increase Google Analytics information and visualisation with Google Data Studio and the roll-out of Google Tag Manager to enable the capturing and visualisation of more detailed information on website traffic and customer journeys.

Meanwhile, the parish portal is continuously evolving, and the team is helping more parishes to make the switch to the new online channel.

“The project is continually evolving – the parish portal is just one element of a bigger piece of work and I think we will learn from the parish portal as we develop other portals. We’ve had our 12-month review and we are continuing to push to get all the parishes on board as well as engaging with them to see how the portal can be improved.”

Emma Jane Lickiss, Project Manager

“The work around the parish portal has really upped our game around agile development and UX design and processes. We really want to take that learning into the other work we do.

“We are looking at adult social services to look at the next round of assessments and have completely redesigned the Blue Badge service. We are also applying the learnings into our internal processes as well as to a lot of the external work we are doing for the benefit of the citizens of North Yorkshire.”

**Robert Ling, Assistant Director
Technology & Change**

Contact for further information

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