



Digital Experts Programme

Test Valley Borough Council – case study update

Background to the project

Faced with the corporate decision not to renew the council's CRM system, together with the need to achieve significant efficiency savings, Test Valley's council tax service looked at alternative means of managing customer contact and consequent workflow.

The council's ambition was to find a solution that would deliver a seamless and supportable council tax and non-domestic rates self-serve facility and e-billing solution. Test Valley sought funding from the LGA's Digital Experts Programme to support the project.

Specific objectives included to:

- Reduce the volume of duplicate data entry, for instance the manual transfer of information from e-forms into the back-office council tax system
- Provide customers with an alternative contact channel available on a 24/7 basis
- Significantly shorten the turnaround time for handling customer transactions, such as processing a house move or setting up a new account, thereby reducing the volume of avoidable follow-up calls
- Simplify the internal processes, freeing up resources for other tasks.

After internal and external consultation in line with procurement procedures, the acting Head of Revenues recommended the purchase of the Northgate Citizen Access product. Customers using the product have the option to transact online including to:

- View their account online, including updating their name and contact details
- Submit change in circumstances e.g. change of address
- Apply for or cancel a single person discount
- Set up a direct debit or sign up for e-billing
- Check council tax band or rateable value.

The position in Spring 2016

Having procured the Citizen Access product in early 2015, Test Valley staff worked with the supplier to, commission appropriate hardware, install the software, develop the parameters for the new system and agree a test plan. Testing took place over June to August 2015. Towards the end of the process, staff entered data from existing forms completed by customers as real 'dummy' data.

The portal went live with customer service advisers in late August 2015. By mid-December the council was satisfied that any remaining issues had been resolved and the new system was 'soft launched' just before Christmas 2015.

In the period leading up to the initial case study, the council monitored the efficiencies arising both from calls avoided and from process efficiencies. Based on a model that every notification submitted by customers has avoided a call (with a cost estimate by SOCITM to be £2.83), and every notification submitted by customers and advisors alike helps avoid the duplication of work that previously arose from staff rekeying data into the back-office system (amounting to 5-6 minutes of time, for illustration valued at £2.00), the estimated financial benefits were as follows:

	Contact avoided £2.83	Process efficiency £2.00	Total efficiencies
Notifications submitted by advisors Aug 2015 – March 2016		3,408	£6,816
Notifications submitted by customers Dec 2015 – March 2016	420	420	£2,029
			£8,845

Our original case study and vox pops can be found at http://www.local.gov.uk/web/guest/productivity/-/journal_content/56/10180/6357119/ARTICLE

The position in Autumn 2016

The council has continued to monitor the number of notifications submitted online (including those entered directly by advisors) and to estimate efficiencies. The position at the end of October 2016 was as follows:

	Contact avoided £2.83	Process efficiency £2.00	Total efficiencies
Notifications submitted by advisors Aug 2015 - Oct 2016		5,477	£10,954
Notifications submitted by customers Dec 2015 – Oct 2016	2,633	2,633	£12,717
			£23,671

As a result of the implementation of Citizen Access, the council reviewed the way that remaining incoming customer telephone calls were handled. This resulted in further changes that now see all local taxation calls being routed directly to the back office without being handled first by the Customer Services team.

Meanwhile, in the Medium Term Financial Strategy discussed by the Cabinet in late November 2016, the Revenues service offered savings options in the region of £200,000 for financial year 2017/18. Although these proposed savings represent an accumulation of the results from a number of transformation programmes, the Citizen Access project supported by the Digital Experts programme has been a key driver in delivering them.

Other benefits and learning from operating the new system for a longer period include:

- Implementation of automatic credit balance transfers to new accounts (now in place)
- Continuing drive to encourage customers to self-serve and apply for e-billing
- Adopting a 'digital-first' approach to new ways of delivering services to customers, for example the possible use of SMS messaging to contact customers.

Contact for further information

For further information on this project, please contact:

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