Digital Experts Programme
Lancaster, Preston and Fylde single sign-on portal case study

The issue and context

Neighbouring councils Lancaster City, Preston City and Fylde Borough are committed to creating truly digital local public services, fit for the 21st century, that put citizens first, give them easy access to the services they use most and join up public services on their behalf.

The aim is to make 'digital' the channel of choice. There is a growing recognition in all three councils that digital service delivery is now mainstream for many citizens and that their expectations are set by the best in the commercial sector.

The councils have a history of joint working and shared service delivery – for instance, around their finance and council tax and benefits services – and as a result use many of the same systems and have a common website supplier.

The partners have been working together on a 'digital contact centre' which will give the 354,000 residents in their combined population access to a self-service 'one-stop-shop' portal containing all the information and services relevant to them based on their post code. In addition, a single sign-on will make life easier for the customer.

Themed 'My Lancaster', 'My Preston' and 'My Fylde', the concept of the digital contact centre is that it can be deployed individually by each of the partners – giving them the ability to tailor their respective digital offerings to meet the needs of their local populations – while collectively offering the strength, resilience and efficiency of joint working and avoiding the costly duplication of each council going it alone.

The digital contact centre project consists of three phases:

- Phase 1 creates an area-based information portal for each council based on a common template and integrating with GIS and property register/gazetteer systems.
- Phase 2 involves the introduction of a single sign-on through the portal, with appropriate levels of security.
- Phase 3 focuses on integrating key back-office systems, such as council tax and benefits, into the portal using a 'bridge' solution and appropriate application programme interfaces (APIs).

The project objectives and targets

The councils' joint bid to the Digital Experts' programme aimed to act as a catalyst for this ambitious project and to speed up its delivery. The LGA funding would be matched by similar investments from each of the three councils. Specifically, it would help to support work on:

- Gathering customer views on what they would expect from a digital contact centre
- Carrying out joint business process mapping and reengineering to ensure both the best possible customer journeys and the delivery of savings
- Optimising the customer interface and experience of the digital contact centre by using area-based information and a single sign-on
- Optimising the system for mobile and tablet devices
- Procuring the bridge system and APIs from third-party suppliers and integrating them with back-office systems on a phased basis
- Marketing the partners' new digital service options through promotional campaigns
- Evaluating the success of the project at key points and highlighting the lessons learnt for future phases.

The expected outcomes of the project included:

- A marked increase in the take-up of digital services and a reduction in unnecessary and expensive contact through more traditional channels. This would allow the councils to focus their face-to-face and telephone resources on people who are vulnerable, socially-disadvantaged or have complex needs.
- A better customer experience and improved customer satisfaction, through delivering a more streamlined, consistent and standardised link between customers and service providers, available round the clock.
- Improved engagement and communication with local people, including the use of 'My Area' alerts and integration with digital social media channels such as Facebook and Twitter

Significant costs savings were anticipated through a combination of channel shift, reduced levels of avoidable contact, the shared design and build of the new system, process redesign and more seamless integration with back-office systems. In 2014, for instance, digital transactions made up just 5.5 per cent of the contact handled by the three councils, while face-to-face transactions made up 22.5 per cent. The partners estimated that a shift from face-to-face to digital of just five percentage points could yield savings of approximately £100,000 across the partnership based on Socitm's standard analysis of transaction costs.

Overall, the digital contact centre project is expected to lay the foundations for enhanced joint working across Lancashire, recognising the potential moves towards new ways of working such as a combined Lancashire authority.

As for timetable, the first step and building block of the initiative was to provide the area-based information platform with single sign-on. The aim was for this to be live by December 2015, following which the partners would bring in new functions on a step-by-step basis over a number of years.

The approach and progress to date

During 2015, the partners appointed project managers, researched the different elements of the portal and worked with their joint website supplier to develop the appropriate technology platform.

A decision was also taken that each partner would concentrate initially on a service that was particularly important for their council. So Preston and Lancaster focused primarily on council tax and business rates, while Fylde chose to start with missed bins.

The advantage of this approach would be that the partners could share experience and learn from each other, short-circuiting the implementation process for different services. They also recognised there might be opportunities to introduce other services during the course of the project – depending, for instance, on council decisions to launch green waste schemes.

One of the most valuable activities during this period proved to be a series of customer focus groups where the prototype portal design was tested.[1] The structure of the events covered:

- An introduction to the focus group and how it would work
- Some warm up questions on the participants' use of ICT
- A set of questions and tasks covering areas such as registering/signing in, the home page, finding information or completing key transactions, and the 'my area' function

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[1] Staff from the contact centre were also involved heavily in the testing, acting as 'customer champions'

- Group discussion on initial reactions to the portal
- Feedback on the ease or difficulty of carrying out the tasks
- Participants' views on the use they might make of the portal
- A summary of the outcomes.

Comments from customers participating in the focus groups included:

'For somebody who just wants to change a few details, I'm not bothered what it looks like it can be as basic as it likes so I can get the job done quickly'

'I didn't see anything about help, so if you did get stuck or weren't sure there wasn't anywhere to go'

'You're not going to changes address very often so there's no reason for it to be out there at the top'

'If you wanted to get something sorted…you might have to wait on the phone for half an hour… just going online is much easier'

'It wasn't clear right at the top that you were registering for email updates'

'There wasn't a very clear log out button'

'I'm probably going there for about four reasons so I want the things at the top to be for what I'm probably just about to try and do, like find a form, complete a form, or find my bin'

'My MPs, councillor, bin collection, that was straightforward, that was laid out well'

On a less positive note, the project experienced delays during the year as a result of a range of factors:

- Day-to-day work pressures and competing priorities affecting the project teams and their colleagues in other parts of their councils
- Pressure on resources at the joint website supplier, which was a small company that had perhaps over-extended itself
- Changes in project personnel, meaning that the new project leads had to spend time familiarising themselves with the detail of the projects and building relationships with suppliers.

'If you start to lose momentum, it can be difficult to pick it up again'. ICT Project Development Officer

It also became apparent that for a variety of reasons – such as the varying status of key legacy systems within each of the councils – the partners would have to move at different speeds towards implementing the portal. This is reflected in the progress below.

Preston City Council
Preston had completed the design and integration of the My Preston single sign-on customer portal by late February 2016, at which point the portal went live. The site is accessible via a variety of devices and customers are able to carry out a range of transactions:

- View and pay council tax bills
- Check details of housing benefit
- Find information on their local area
- View, complete and save council forms
- View tenant schedules (landlords).

Initially, the council had intended to allow business customers to view the accounts and pay business rates, but the sign-on process was more suited to individuals than businesses and that part of the site was suspended. Preston is now considering whether to add a business-specific part to the site or create another mini-portal for business customers.

By mid-April 2016 the site had over 1000 active users and by early December some 4000 people had signed up. Around 200 additional users are registering each month. Preston is collecting data on these customers and has deployed Siteimprove's heat mapping tool to investigate customer journeys through the portal and the most popular clicks.

The council carried out some initial marketing but recognises that a further push is now required.

The project team is also keen to add more services and transactions to provide residents with an incentive to sign up to the portal and to drive up usage. Functions under consideration include:

- Council tax and housing benefits changes of address and changes of circumstances. These forms were being tested in early December 2016 and will link directly from the portal to the relevant back-office systems.
- An integrated benefits calculator and application suite. This is being explored in collaboration with the contact centre, welfare reform and council tax teams in Preston, with the aim of introducing the facility into the portal in early 2017.
- Garden waste. Like many councils, Preston has introduced a successful garden waste collection scheme which now has around 18,400 subscribers. The project team would like to integrate the garden waste scheme into the portal, although there is some nervousness within the council about whether this move might deter some subscribers.
- Missed bins, building on Fylde's experience (see below). This function is not likely to be available in Preston until mid-2017.

Other ideas for developing the portal include:

- Pre-populating fields within forms using the details that customers have already entered when registering on the portal, thus avoiding laborious re-keying on the customer's part
- Extending or revising the 'Near Me' function on the portal so that people who are not currently resident in the city but who work there or are planning to move into the area can search for local facilities
- Further developing the ability of customers to track the progress of applications or service requests through the portal.

'We've got a great product. The important thing now is to make as much use of it as possible'. Digital and Web Manager

Fylde Borough Council
Fylde's primary focus has been on missed bins. The aim has been to link the portal to the borough's back-office and in-cab systems, so that customers can report missed bins online, but operatives can also log the reason why a bin has not been collected (for instance, the bin is contaminated) while on their rounds. The customer will be presented with this explanation when they go into the portal. Clearly the system depends on accurate geographic information to locate households and bins.

By April 2016, the council believed it was in the final stages of site design and user testing for the single sign-on and missed bin facility. However, technical problems, in particular with mobile integration to the site, delayed the 'go-live' date and it was not until July that the council was able to report that the missed bins facility was now fully live, the system was accessible on multiple devices and a marketing campaign had started.

All appeared to be going well during the following two months, but by late September 2016 the council began to receive emails from customers highlighting problems around the system's address look-up. On investigation, the project team discovered that the integration between the portal, back-office system and in-cab technology was not functioning as expected, although other elements of the solution such as forms were working well.

As this case study was being prepared, Fylde was about to hold a meeting with development staff from the different suppliers involved to seek a resolution of the problem. In the meantime, the council has understandably reluctant to promote the portal as actively as it would have wished, as the key missed bins functionality is not yet fully there.

However, despite the set-back on missed bins, Fylde has been implementing other services through the portal:

- Payments for council tax, business rates and invoices went live in July 2016.
- Council tax and housing benefits changes of address and changes of circumstances went live in mid-September 2016.
- Discretionary housing payments were implemented in November 2016.
- Direct debits for council tax and business rates are planned for January 2017, as are the facilities to view council tax bills and sign up for e-billing. If appropriate, these functions will then be promoted during the council tax billing cycle at year end.
- Green waste has recently been approved for a likely start date of mid-2017.

Overall, Fylde is aiming to review key service areas so that both customers and staff follow the same processes, rather than separate external and internal processes as at present. The council also believes strongly that any services put onto the portal must be linked directly into the relevant back-office systems, thereby avoiding time-consuming re-keying of data.

Integrating social media into the platform is also a priority so that customer tweets or Facebook postings are handled in the same way as other contacts such as telephone calls and staff can respond directly via the portal using the customer's preferred social media channel. The council has also built reciprocal links between the portal and its 'My Council Services' mobile and web app.

Fylde is marketing the portal via three main channels:
- *Traditional and e-comms*
  - *Upselling via the contact centre*
  - *Email shots to subscribed customers outlining features of new applications and the benefits of signing up*
- *Website and digital*
  - *My Fylde linked to council website and designed to match the look, feel and accessibility of fylde.gov to provide cohesive customer journey*
  - *A news article and promotional bubble area added to the resident section*
  - *A website tab on the fly-out main menu has been added for My Fylde*
  - *A tile for My Fylde has been added to the homepage of Fylde Council iOS, Windows and Android app*
- *Social media*
  - *Platform promoted via Facebook and Twitter – this is a major focus for marketing*
  - *'How to Register' video produced and added to the council YouTube channel. This was also added to news article produced for fylde.gov.uk.*

Lancaster City Council
By March 2016, Lancaster had completed the design of its single sign-on portal under the Digital Experts programme, including the relevant forms, front end and log in. The initial aim is to offer customers the chance to view and manage their council tax or business rates accounts and view customised local geographical information.

However, full integration of these and other services into the portal has been delayed by the need to find replacements for two main systems, both of which were no longer fit for purpose:

- The council's old geographical information system (GIS), which was no longer supported by the manufacturer. As this system was also due to come out of contract in the summer of 2016, there was therefore little point in integrating the portal with it. As at early December 2016, a functioning address look-up linking the council's website and e-forms to its local land and property gazetteer had been established, but Lancaster has wider ambitions for its GIS.[2] A decision on which route to take was expected imminently.
- The existing CRM system which is now considered out-of-date and too inflexible to meet Lancaster's current and future requirements. A meeting was due to be held in mid-December 2016 to review the main options for a replacement.

At the time this case study was being prepared, therefore, no fixed date had been set for making the Lancaster portal live.

Despite these set-backs, the council has made a great deal of progress on other aspects of its digital journey. For instance, a new, mobile-friendly website was launched in late March 2016, based around tasks rather than information.

Lancaster's Digital Experts project manager worked closely with both his ICT and customer service colleagues to ensure that the customer journeys in the new site truly reflected what customers were telling the council. The team also took the opportunity to do a massive cull of the pages on the previous site, only reinstating many elements if either a service department or a customer made an active request for that piece of information.

In August 2016, the council also launched a new iLancaster app. This was advertised on key parts of the website, such as the pages dealing with bins, fitness classes and parking (three main features of the app). In addition, customers are sent a link to the app when they register for Wi-Fi at any of the council's three free Wi-Fi access points. The waste enforcement teams are also publicising the app to 'problem households' to promote responsible bin behaviour.

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[2] For instance, any new GIS system should be able to draw upon address-based datasets, such as My Councillor, resident parking, the bin collection calendar and so on

By early September 2016 had attracted 2,626 active users broken down as follows:

iOS: 958
Android: 413
Web: 1,255
Total: 2,626

The number of sessions (how many times people had gone into the app) had by then reached 12,259, with the most popular menu choices being the transport hub, events listings and bin collection.

From surveying its council housing tenants, Lancaster knows that it has a sizeable demographic with a smartphone but no PC. The area also hosts two universities, which means there is a large transient population that may not visit the website, but would be predisposed to using an app.

Since there has been little reduction in the use of similar functionality (e.g. checking the bin collection calendar) on Lancaster's website, the council believes that the app users represent customers who prefer to engage digitally via apps rather than a corporate website. These customers would probably had telephoned previously.

Further progress was made in November 2016 when a new garden waste collection scheme was launched, making use of the templates developed via the Digital Experts project. There was some debate about whether to make the new service online only, but it was decided that the borough's demographic profile did not allow for this.

However, the online option has been promoted heavily and the details on the website for instance do not include an email address or telephone number (although the first option on the council's general telephone number is for garden waste). The result has been that more than two thirds of the subscribers have registered online and the rest by telephone. Despite being launched at a quiet time of the year, the scheme has already attracted 6000 participants.

Looking to the future, Lancaster is keen to learn from Preston's experience as the two councils have a shared service for council tax and benefits and so will encounter the same obstacles/issues. Lancaster also plans to obtain in-cab devices for its waste collection fleet in late 2016 or early 2017 and there is an opportunity to feed Fylde's outputs and learning points into the planning stage for the proposed in-cab device functionality.

The outcome – successes and challenges

The three councils' wider move towards a more digital way of working has already brought many benefits. For instance, as mentioned earlier, Preston's garden waste scheme launched in July 2016, although not yet integrated into the My Preston portal, achieved a 73 per cent online

take-up (representing 13,500 households) and has already generated around £400,000 for the council.

Meanwhile, the Digital Experts project has contributed to specific financial and non-financial outcomes, both within the individual councils and across the partnership. These are summarised below.

Financial benefits
The councils are anticipating full-year savings either achieved or in prospect of over **£250,000** supported by the Digital Experts investment, made up of:

- One-off savings from sharing development costs on both the main portal and on specific elements (such as council tax and benefits change of circumstances forms) estimated by the project teams at around £43,000.

- Savings identified through channel shift and reduced administration costs of an estimated £129,000 (Preston), £22,000 (Fylde) and £59,000 (Lancaster).

Since Lancaster used the Digital Experts templates for its garden waste launch, the project can also be said to have contributed to the £238,000 of additional revenue already raised by the council.

These figures have been calculated as follows:

Preston
The contact centre and one-stop shop at Preston have seen a marked downward trend in both telephone and face-to-face contact since the new portal has bedded in and the number of subscribers has grown.

In the four months of August to November 2016, for instance, the contact centre and one-stop shop handled around 7,400 fewer telephone calls and 2,400 fewer face-to-face contacts than in the same period in the previous year. If these figures are scaled up on a full-year basis, they broadly correlate to the increase in digital transactions of around 26,000 (primarily through the portal) that the borough experienced between 2015 and 2016.

Applying Socitm's standard cost per contact model of £8.62 per face-to-face transaction, £2.83 per telephone call and £0.15 per online contact, the borough will generate an estimated saving of around £120,000 over a year.

Meanwhile, the imminent introduction of online council tax and housing benefits changes of address and circumstances forms will save an estimated 286 hours of staff administrative time annually or just over £5,700, while reductions in cheque processing will offer an illustrative saving of around £3,300 per annum.[3]

Fylde

Despite the technical issues it has faced with integrating its missed bins process fully into the portal, Fylde has experienced a growth in digital transactions since its launch. The period July to October 2016 inclusive saw an increase of over 2,700 digital transactions compared to the same period in the previous year.

If this were scaled up on a full year basis, this would represent additional digital volume of more than 8,000 transactions or a potential cost avoidance of just under £11,000 if only half of these online transactions would otherwise have come in by telephone.

Meanwhile, the volume of council tax and benefits changes in circumstances and addresses processed via the portal since the introduction of these services in mid-September was 334. Work in other Digital Experts projects has suggested that handling such transactions online saves not only contact handling time but also significant back-office administration to an aggregated value of around £8.50 per transaction. Fylde can therefore be said to have saved an estimated £2,800 to date or over £11,000 on a full year basis.

When the online missed bins process becomes fully functional, Fylde can anticipate further administrative savings from handling the approximately 600-700 requests it receives each year.

Lancaster

Lancaster's main use of the Digital Experts funding to date has been in the launch of its garden waste collection scheme in November 2016, where it made use of the templates developed during the project.

Even though the winter is usually a quiet time for garden waste collection, the scheme had already attracted almost 8,000 subscribers, 71 per cent of whom registered online. Assuming the online subscribers would otherwise have contacted the council by telephone, this represents an avoided cost of over £15,000.

Lancaster estimates that the overall annual take-up is likely to around 31,000. The potential savings in contact would therefore represent close to £59,000, not counting any additional savings in cheque processing.

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[3] Staff time calculated at £20 per hour including on-costs. The additional cost of cheque processing estimated at £1.06 per cheque

Meanwhile, the council has already raised around £238,000 of additional revenue for reinvestment in local services, to which the Digital Experts project has contributed.

Non-financial benefits
These have included:

- A new role for the contact centre: in all three councils, the contact centre is moving away from performing a transactional role towards one which is more focused on signposting and acting as a support centre that encourages people to use digital services wherever possible. In Fylde, this move has been complemented by the introduction of more self-service kiosks, while Preston has introduced more public access PCs in its one-stop shop. This changing role has been vital in helping the partners manage the financial pressures they are facing and the impact on their staffing. For instance, Preston's contact centre has had to cope with the loss of some eight FTEs over the last two years as a result of budget cuts within the council.[4] It could not have done this without the shift to digital delivery.
- Better working relationships: the Digital Experts project, and the councils' wider work on digital, has helped to foster closer working relationships between the ICT function, the contact centre and service departments. There are now really positive conversations about the future shape of services, how processes might be improved and how digital can help.
- More technically-confident customers: the partners are constantly encouraging customers, whether on the phone or face-to-face, to explore how they can do things digitally. There has also been a knock-on effect on staff (many of whom will of course be customers for council and other services), who are becoming more confident about using technology. This can only help prepare people to take advantage of an increasingly digital world.

'Remember the digital world is here and join in. That would be my advice'. Contact Centre Manager

Key learning points
Some very important learning points have come out of the project:

- Testing web developments with customers in a simulated 'live' environment is essential if a project team is really to understand the customer journey through a portal and its associated services. It is important not just to test the portal once, but to set up

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[4] The council introduced an IVR system in 2015, which has also helped to mitigate the impact of the staffing reductions

processes to continue monitoring its performance – for instance, by monitoring customer behaviour on a regular basis.

- The potential role of customer-facing staff such as contact centre and one-stop shop advisers in acting as 'surrogate customers' should also be noted. Actively involving these staff also helps to ensure that they are aware of the project at an early stage, have the opportunity to contribute their insights and, as a result, are more supportive when it goes live.
- There are many advantages to councils working in partnership, including the ability to share costs and resources, to adopt templates and processes that other partners have already developed, and to learn from each other's ideas and experience. However, partnerships need to be managed carefully, particularly where the partners involved are smaller organisations with limited staff resources. And it is important to put in place a formal partnership structure, however 'light touch', as well as to develop an agreed specification and set of project milestones, so that the project managers have the required level of sponsorship and support in meeting their objectives.
- Similarly, there are advantages in working with a smaller supplier, who may be more flexible in their development approach, less bureaucratic in their account management processes and more responsive to requests for changes. However, smaller suppliers may also lack the capacity to meet peaks in demand or may overcommit themselves. Councils working in partnership are likely to benefit, therefore, from working co-operatively to keep the supplier (and each other) appraised of future projects, so that priorities are clearly set out and understood.

'We couldn't have done the project financially if we hadn't worked with our partner councils and had a supplier who was willing to be flexible.' Web and e-Marketing Officer

- Finally, the real value of digital comes from creating truly end-to-end electronic processes, thereby eliminating or minimising re-keying, rather than just putting PDF forms online. However, the complexities of integrating different elements of a solution, including web front-ends, payment engines and back-office systems, should never be under-estimated. This issue is particularly acute where older council legacy systems are involved. Any project plan needs to build in reasonable contingency arrangements to allow for technical issues to be identified and resolved.

'You only find out a lot of things on day one when you go live, so be prepared.' Web and e-Marketing Officer

Next steps

All three councils feel that they now have in place an infrastructure on which they can build rapidly and into which they can integrate a range of online services in the coming years.

The strategic challenge is for all the partners to ensure that the investment is fully realised. This will require councillors, senior managers and all the different departments in each council to accept that 'digital' is now a mainstream way of operating and to put the necessary resources into marketing and 'evangelising' their digital services.

Fortunately, there are many positive signs – not least in the way that the partners' contact centres are seeing the move towards digital as complementary to rather than in conflict with their work, allowing them to concentrate on those customers who really need their help.

'This is not a one-off project but a platform. It's as if we've built the chassis. Now we need to bolt on as many features as possible in a structured and cost-effective way.' Head of Communications

Contact for further information

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