S & R 1ˢᵗ December 2022 Appendix G

Customer Services and Digital – Emerging Business Case

1. Update following Member Workshop

The emerging business case below was provided to all Members ahead of a workshop on Digital and IT. This version has been reviewed to remove commercially sensitive material. Further work will be undertaken following the workshop in the following key areas, addressing Member feedback.

Digital inclusion
The new digital technology can help us to reduce costs, and we will encourage people who can access our services online to do so, which means we can focus resources on those more complex services and those customers less comfortable with digital technology.

We know that not everyone will want to contact us in this way, and we will continue to provide services through other means. Members asked us to focus on those that are not digitally enabled or cannot use the digital channels through a new communications strategy. A workshop is being arranged on developing the strategy and this will be included.

Other key themes/actions:
- Aligning approach of software with other Surrey councils
- Gather data from other districts and boroughs about the existing use case application of their digital provision
- Clear evidence to be gathered and provided on the savings
- Detailed success factors
- Examples from other councils of gains/benefits from the application of the tools being considered
- Engage external support for direction regarding the website evaluation and redesign
- Develop future use examples, including example personas and detail the business value for each 'to be' process
- From BVA, derive outcomes and success criteria
- Define how councillors can provide input to use cases/personas etc
- Gather data on the number and reason for resident's visits to the council offices

2. Background and Summary

A digital-first approach is not just about an improved website, new technology or reshaping customer service. It is about moving the whole organisation from traditional models of delivery (face to face, phone calls, letters etc) to a model where a large part of the contact will be automated and conducted online. This has the potential to fundamentally change the way customers interact with the council as well as altering the way staff work. As a result, it is as much a cultural change as it is a change of delivery.

The number of people wanting to communicate, interact and transact through digital channels has steadily increased. Digital change is seen as positive to make us more customer focused, environmentally friendly and immediate, but also to enable agile and flexible working for employees. There is a lower cost per transaction, improves quality of the data collected, leading to more efficient processes.

In the last few years, the Council's use of digital channels has grown, and residents are using the services we have already made available online. The council developed and approved an IT & Digital Strategy in June 2021.

The strategy identified that the challenge is to provide the right service to the right residents when and where they need it. The ambition is to provide efficient, cost-effective services 24/7 to a growing majority of our residents.

The digital aspirations were underpinned by three critical ambitions:

- **Accelerating channel shift**
  More people will be able to access the services and information that they want, when they want, online without needing to contact us. To ensure the same or increased level of digital presence in all council core services while keeping open non digital channels for those that need them.

- **ICT modernisation and resilience**
  To continue to consolidate, standardise and simplify our current technology estate with improved integration and connectivity between core systems. To keep our networks and systems updated, secure and safe to protect the data of residents and businesses.

- **Working smarter**
  To be able to work easily from wherever they are, with the right tools and training, embracing what technology can offer, supported by a leadership team that exemplifies digital thinking.

This business case is focused on how we can improve our customer services offer to our residents and businesses by the introduction of new digital tools, including a review of existing applications and infrastructure.

3. Scope & Approach

3.1 Scope

The scope of the review comprised of the following:

- The Council's existing digital capability and future aspirations
- A review of the current line of business (LOB) application estate
- The Council's IT infrastructure
- The IT Team structure
- Customer Services current delivery model

3.2 Approach

- In terms of a review of the Council's **existing Digital capability** the following was undertaken:
  - o Capturing of the As Is architecture to define what the existing digital provision looks like, what works, what the challenges are and what would be the cost of moving off the existing foundations.
  - o Art of the Possible analysis to assess which existing technologies could be further developed, how and at what cost.
  - o Demonstrations from other vendors operating in the digital tech space to better understand the market offerings.
  - o An assessment as to the extent that this range of digital solutions could support the future service delivery ambitions currently being explored (commissioning, outsourcing etc).

- The review of the organisations current **LOB application estate** was undertaken with business and vendor engagement and focussed on:
  - o Its existing challenges both from an operational and technical perspective.
  - o Opportunities for rationalisation to enable the estate size and complexity to be reduced.
  - o Cloud migration opportunities and associated cost/benefits.

- The review of the **Council's IT infrastructure estate** was necessarily a purely technical exercise and examined:
  - o As Is operations and existing challenges
  - o Opportunities for estate rationalisation to enable the estate size and complexity to be reduced
  - o Cloud migration opportunities and associated cost/benefits
  - o A 'future ready' assessment

- An assessment of the **IT Team Structure** was undertaken to look at:
  - o What the existing skill set and capability is within the Team
  - o What the workload typically looks like As Is
  - o What short term resources might be required to develop enhanced digital capabilities.

- o What future changes might be required to support enhanced Digital capabilities.
  - o What short-term changes might be required to enable and infrastructure cloud migration
  - o What future changes might be required to support a hosted infrastructure.

- A review of the **Customer Services** current delivery was reviewed and the following undertaken:
  - o What changes would be required to reduce demand and be increasingly digital
  - o How to increase the range of services currently available through the website and/or out of hours
  - o Opportunities for enabling and encouraging customers to self-serve
  - o Opportunities for streamlining and removing unnecessary processes
  - o Opportunities for outsourcing the outgoing mail provision
  - o What changes would be required to remodel the customer services team to support delivery changes

3.3 Dependencies/Impact Assessment

The impact of the review is potentially the following:

- o Enhanced digital/self-service provision made to residents and businesses within the district via the development of existing tools and implementation of new technologies.

- o The further automation of some frontline services and business processes as a result of the wider application of these technologies.

- o Better data capture to support the strategic development of Council-wide service delivery and key performance indicator (KPIs) management.

- o Reduction in the number of line of business (LOB) applications within the existing IT estate.

- o Reduction in the size and complexity of the existing infrastructure estate.

- o Migration of a smaller, less complex infrastructure to the cloud.

- o Restructure of the IT Team and Service Delivery model.

- o Restructure of the Customer Services Team and Service Delivery model.

In terms of dependencies:

- There is a technical dependency for the digital implementation on the replacement of the existing telephony software, which is currently in the solution option assessment phase.

- The reduction of LOB applications is dependent upon corporate level decisions being made regarding the IT Strategy: best of breed vs 'modular' solutions that have the capability of a range of applications.

- The data capture proposal will ultimately be dependent upon what the Council wants to capture and monitor when decisions have been made regarding its commissioning/shared service ambitions

- The migration of infrastructure to the cloud will likely be dependent upon a number of 'stepping-stone' projects, each of which would be required to reduce the scale and complexity of the existing infrastructure (thereby reducing cloud migration and running costs), as well as to make it Azure compatible. These will all need to be individually assessed and costed.

- The restructure of the IT Team and Service Delivery model can only be completed when all other impacts/deliverables resulting from this review have been established. It is also likely that reviews being undertaken for other services will also need to have concluded where there will be an anticipated impact to IT.

- The restructure of the Customer Services Team and Service Delivery model can only be undertaken and completed when the digital tools have been implemented.

4. Current Service Baseline

Existing Digital capability

The Council's existing digital tools comprise of approximately 50 online forms which create Salesforce cases and allow workflow management across the following services:

- Operational Services
  - 20 forms to enable residents to report a range of issues.*[data to be provided regarding % of work being channelled online]*
  - Since going live with these, over 9,000 cases have been created.
  - Previously this was being managed using pdfs and emails, calls etc. [feedback to be included regarding the operational impact of this]
- Covid Grant application management
  - Almost all covid grant applications were processed on Salesforce (approximately 10,000)

- - The flexibility and low code/no code nature of the platform enabled the Council to make a form available to residents and business within days.
    - Without Salesforce the forms would have taken much longer to build and all grant applications would have been managed using pdfs and emails.
  - FOI/EIR/SAR/Complaints
    - Each of these is now being managed in Salesforce.
    - Previously this was managed through a combination of pdfs, emails and Civica. [*feedback to be included regarding operational impact of this*]
  - IT
    - The IT Helpdesk has been built in Salesforce
    - This replaced the previous software (BMC) – the version the Council were paying for offered little integration ability or reporting options. [*feedback to be included regarding operational impact of this*]
    - The Council's IT asset database has also been built using Salesforce, linking all end user devices to employee contacts within Salesforce to enable asset tracking, management and stock monitoring.
  - HR, Finance, Legal & Communications
    - Internal, 'Raise a case' forms have replaced shared email inboxes for these services. A powerful case management system is in place [*feedback regarding operational impact to be included*].
  - Waste
    - Online forms bespoke to each collection type
    - Missed bin form enables real-time look-up to Biffa's Whitespace to identify the location of the vehicle and if the collection has been missed or a lock-out reported by the crew.
    - Since going live over 45,000 waste cases have been created [*data to be included regarding % of work being channelled online*]
  - Planning
    - Over and above being used for the receipt of all TDC Planning applications received via the national Planning Portal, Salesforce is also used for: CIL and S106 case management as well as Land Charge search requests.

One of the main benefits of using Salesforce to manage workflow is that all information relating to a case and the customer is held centrally and not in individual officer's inboxes. This ensures there is a clear tracking and audit trail.

The Council's customer relationship management system (CRM) is built in Salesforce. The majority of staff can access Salesforce although access to sensitive data is restricted to particular teams. The benefit of a council wide CRM is the ability to have a 365 view of the customer, for the teams that need it. This means all interactions can be viewed and officers have a better understanding of that customer's needs.

The Council has recently (January 2022) introduced a Customer Account for the Revenues and Benefits Service. Citizen Access is provided by NEC and sits on top of the LOB application. It offers a range of online forms, as well as the ability for residents to log in and access information relating to their payments and applications.

For the purpose of context, in addition to supporting the submission of online forms and providing the required case management, Salesforces is also used for:

- Planning Development Management
  o In 2015 the Council moved to using Salesforce as the platform to provide this service.
  o This was undertaken with Arcus Global and while the Salesforce platform was the underlying technology, the application that was implemented was Arcus's Built Environment. The annual cost of this was £72,000 per year.
  o Following the Council's implementation of its own Salesforce Org in 2019 and the development of the IT Team's in house skills to support and develop the technology, a decision was made to build Planning DM capability in the new Org that had been implemented for CRM and Case Management – especially since the Council was paying for licences for this for Planning anyway.
  o Planning DM went live on the newer Org in October 2020 and notice was served to Arcus, saving the Council £72,000 per year.

- Waste
  o In 2021 the Council went live with a new Waste Management contract with Biffa.
  o A key aspect of the new contract was an enhanced integration build between Biffa's new waste management software (Whitespace) and the Council's CRM.
  o Prior to the Council's move to Salesforce, basic Waste Management process were delivered using Civica. To have built the required level of integration between TDC technology and Whitespace using Civica would have been at best a significant and complex undertaking, and at worst not possible. The Council's use of Salesforce enabled the build to be completed within 16 weeks and is continually developed to match the needs of the service using in-house skills.

To support its use across a range of services, Salesforce has been integrated with a number of other platforms and technologies – almost exclusively using in-house capability:

Application	Function
Conga	Planning doc templates
Form Assembly (all online forms)	All online forms

Google maps	Allows users to pin-point non-address based locations when submitting forms
GIS	Spatial data, plot demarcation, consultee capture
LLPG	Property data
National Planning Portal	Most TDC planning applications are received via the portal
Civica	Links to documents within cases
Whitespace (Biffa)	Biffa's Waste Management application
Adelante	Online payment and income administration gateway
Clearcore	Master data management, consolidating back-office data feeds

An estimate of the time that it has taken to develop the Salesforce platform is about 7 and a half years (the implementation commenced in 2017 and some of the initiatives ran concurrently). For further detail on the usage of Salesforce within the Council see Appendices.

Tandridge website

The website is made up of a core site, integrated with other microsites including ModGov, the planning search and documents, planning consultation, payments, maps, Homechoice and forms.

The core Tandridge website was completely rebuilt in 2017, following extensive research and testing with users to ensure the navigation, look and feel met users needs. For many residents the website is their first port of call for service information, guidance, forms and contact details.

The objective was for the site to continue to be developed as the Council improved the digital services and experience offered to residents, for example introducing web chat and a chatbot. The pandemic and other priorities has meant progress in this area has been slower than anticipated.

In addition, it is critical the information on the website is accurate and up to date to give customers confidence in the data provided. This relies on the service areas maintaining the content, while the Communications Team's role is to ensure it is accessible, easy to read and understand. A robust page update system is in place, but teams must take responsibility for their service's content. However, although reminders are sent to teams annually to review the content on their service area, pages are often out of date and not seen as a priority to maintain.

This ties in with the internal cultural change that needs to take place, which means every officer confidently and automatically refers customers to the website for the information, a form, a transaction etc. This in turn will drive the external cultural change needed among our residents to think of digital access before an e-mail, a phone call, or a social media request.

Councillors also have their part to play in this – they should be able to refer residents to the website knowing that the information or tools they need to access a service will be available.

Current LOB IT Estate

The current LOB estate at the Council is comprised mostly of 'best of breed' applications, with purchasing decisions having been made by the service areas themselves.

There is a mix of on premise applications (installed on servers running in the Council's server room) and cloud-based applications (provided through software as a service (SaaS)). The table below details the most operationally and financially significant of these.

Items shaded green are installed in the TDC server room (and therefore supported by Tandridge IT), items shaded orange are hosted (Microsoft is hybrid) but are also supported by Tandridge IT. Applications in white are minimally support by IT.

Department	Software name	Supplier Name	Description
Finance	Adelante	Adelante Software Ltd	Payment Gateway - Annual Maintenance Contract
	Agresso	Sevenoaks District Council	Annually renewable hosting & support fee for the Agresso system. (Shared Agresso Financial system hosted by Sevenoaks Council)
	Eiger Pay Gateway	Bottomline Technologies	BACS transmission gateway
	Bank Wizard	Experian	Annually renewable licence for account code checking software
Housing	Housing Enterprise (Orchard)	MRI Software	Social housing & property management system
	Homeswapper	Housing Partners Ltd	Internet-based mutual exchange service
	Civica Abritas	Civica UK Ltd	Social & Homeless Database
	M3 Locator Plus	M3 Housing Ltd	Schedule of rates annual licence fee.
Customer Services	Mitel	Britannic Technologies Ltd	Mitel Estate supprt
Democratic Services	Civica Mod Gov	Civica UK Ltd	Meeting and Governance Management Software solution.
	Eros	IDOX	support & maintenance of electoral registration/election management system
	Public-I	Public-I	Webcasting and Audio-Visual
Planning	Conga	App Extremes LLC	Salesforce document production & templating
	iShare	Astun Technology Ltd	iShareMaps,iShareGIS, ADS
	ArcGIS	ESRI (UK) Ltd	Geographical Information Service
	LLPG	GGP Systems	Annual Software licence & maintenance - LLPG.
Planning Revenues & Benefits	Civica W2	Civica UK Ltd	Support & Maintenance of document management system, Planning doc viewer & licensing
Revenues & Benefits	NEC	NEC Software Solutions UK Ltd	Revenue and Benefits software and Citizen Access online portal
	Nominet	Nominet	PSN DNS resolver required for access to Searchlight
Human Resources	I-Trent	MHR (Midland)	Human Resources system
Legal	iKen	Iken Business Ltd	TDC Legal Case and Doc Management Software
	Docusign	DocuSign	Electronic signature software - Business Pro Edition
Communications	Purple Creative	Purple Creative Services Ltd	Website hosting, Design and development
Corporate	Microsoft licencing	Phoenix Software Ltd (reseller)	Licenses for O365, virtual servers & data centre licences
	Salesforce service cloud	Salesforce.com	Enterprise Edition plus basic support
	Form Assembly	VEER WEST LLC	Web forms solution

Current Network & Infrastructure

The current IT network and infrastructure estate consists of:

- 5 physical servers hosting approx 93 virtual servers:
  - 50% of the server estate is used for LOB applications
  - 50% is used for infrastructure and management servers (i.e., file servers, print servers, endpoint management/security servers).
  - These servers are supported by UPS's (uninterruptable power supply units) to give the hardware 4 to 8 hours run-time in the event of a power outage.
- Several physical connections which provide our corporate internet connections, guest internet, Unicorn, Kent Connect (to Sevenoaks for Agresso access), circuit to Warren Lane depot and an ISDN line for Telephony.
- 3 firewalls and 2 reverse proxies to protect the network and manage in and outbound traffic.

Back-ups are stored locally to disk for short term recovery and to the cloud (Microsoft Azure) for long term recovery.

The infrastructure requires routine maintenance and needs knowledgeable resources to keep it functional and secure. The virtual infrastructure requires monthly patching and undergoes weekly security scans that require remediation.

The on premise hardware is located in the server room at the Council offices. The room has a secure door entry system, fire suppression system and continuous air-conditioning all of which require regular maintenance. The running costs of all aspects of the physical IT network and infrastructure are currently being established and are likely to increase as a result of energy price increases and inflationary pressures.

The hardware itself will be out of support in just under 3 years' time and require replacing at an expected cost of around £400,000.

As Is Azure:

The Council currently has a modest Azure footprint, using it predominantly for back-ups, user's identity management and security features. The on premise estate is connected to the Azure tenant via the VPN. The servers hosted in Azure are used for single sign on to Office 365.

The Council also uses MFA (multi-factor authentication) provided with Azure for access to applications such as Salesforce, O365, Citrix and Esri's ArcGIS.

Current IT Team structure and workload

- o Currently comprises of 9 FTE with the workload structured as follows:

    - o 1.5 1st and 2nd line Helpdesk support (supporting approximately 300 users across all sites).
    - o 3.5 Application Specialists (supporting Orchard (Housing), NEC (Revenues & Benefits), Salesforce (CRM, corporate case management, Planning & Waste Services), Form Assembly, Adelante (payment gateway), Mitel (Telephony), Civica (EDMS), Eros (Dem Services) and others).
    - o 1 Developer/DBA/integration Specialist
    - o 1 Infrastructure Specialist
    - o 1 Network/Infrastructure Specialist (1 yr FTC)
    - o 1 IT & Project Delivery Manager responsible for managing the service and some of the more sizeable/complex IT initiatives.

Typically, the team spend 65% of their time undertaking support and maintenance ('keeping the lights on') with the remaining 35% being spent on development and project work.

Customer Services Team Structure and Workload

- Currently the team comprises of 14.4 FTE as follows:

    - o 1.8 team leaders
    - o 10.6 customer service advisors
    - o 2 case officers (working within the mail room, various tasks including scanning and indexing documents)

The work of the team:

- First point of contact for council tax, waste, parking and general enquiry calls
- Receipt and indexing of emails to customerservices@tandridge.gov.uk, the Council's main e-mail address.
- Opening and sorting incoming post
- Franking, batching and sending of outgoing post
- Scanning and indexing for revenues and benefits
- Scanning and redaction for planning
- Administration of licensing on behalf of environmental health
- Parking permit administration and billing
- Various other front office (reception) tasks for other services across the council
- Social media (monitoring of customer comments, enquiries and responses)

4.1. Analysis of existing service *(Service review themes/challenges)*

Tandridge's **existing Digital capability** has some notable limitations:

- The self-service/digital tools that are available are unconnected both in location and function:
  - Online forms are sited on service-specific web pages as well as the report and apply pages. Due to the way the forms are built and hosted they are difficult to find using the website search, and often require multiple 'clicks' to reach. Users can't be 'known' by the forms as there is no authentication (identify proving function), meaning that every time someone uses a form all contact details need to be given again.
  - The Revenues and Benefits portal requires users to navigate away from the Tandridge website.
- The existing set of online forms are not scalable or cohesive:
  - For the purposes of version management/change control, each Form Assembly form exists in triplicate – in live, in test and in development. For technical reasons, some forms are in fact multiple individual forms (presented to the user as a series of 'pages'). Sitting behind the 50 online forms that residents can access via our website are closer to 70 individual forms in Form Assembly, each with a version in live, test and production, so 210 forms in total. This is not a small overhead when only 3 members of the IT Team can configure and support the application. It is likely that the Council is reaching its limit in terms of the number of forms that can be supported with existing resources. In addition, because they have been developed over time there is not always a consistent look and feel which provides a poorer customer experience.
  - As technology advances and as regulations change, new features become available and/or are demanded of form functionality. It is not always possible to retro-fit features or continually ensure that old forms look and behave the same as new ones. Not only is this an overhead on the IT Team it also delivers a non-standard, poorer customer experience.
- The lack of authentication/ability to 'log-in' means also that residents cannot digitally:
  - interact with service requests or transactions
  - view status updates
  - make changes to their data
  - provide additional information required
  - receive a 'personalised' experience from the website: ie. be presented with content that is relevant to them

- The Housing service offers minimal provision in terms of digital tools. Residents can access Homechoice for choice-based lettings and mutual exchanges, but tenancy management, rent management and repairs are principally transacted and managed using telephone, email and paper-based documentation.
- Website design and UX – the website was built following extensive research and testing with users to develop the most logical design and navigation for customers. Once built the expectation was that other tools would be added such as web chat or a chat bot. The website is now five years old and needs to be reviewed and updated to ensure it is meeting customer needs and best practice. [*data to be provided regarding website usage, how many journeys end on the 'contact us page' etc.*]

- It also requires more commitment from all the service areas to ensure content is accurate and reflects customer demands and enquiries. In addition, all staff need to think about the website as the first port of call for residents and businesses and refer them to it, but this requires a cultural change. There is currently a lack of engagement from the business regarding resources/ownership of website content. This speaks to the required cultural change needed within the organisation – there is no point in having the resources and tools if people do not maintain them.

- The Council has limited ability (due to technology as well as resource constraints) to proactively reach out to its residents and businesses within the district in a targeted manner. The landing page on the website is used for 'public broadcasting' but space is limited and therefore so is content.

- Additionally, given it will be seen by all visitors to the website, only content relevant to a majority audience is posted. This combined with a proposed reduction in the Communications Team as a result of the service review means that proactive, digital contact with residents and businesses (to advise them of service issues/changes, chase payments, promote services and assistance) will be more limited. Additionally, when it is undertaken, the Council are only able to contact those residents who have requested specific updates (signed-up to newsletters etc) and this can only be conducted via e-mail. A new approach to targeting information and messages is needed, which meets data protection requirements

The existing **LOB applications** used by the organisation have been reviewed to establish:

- their current state of 'health'
- their future road map (as determined by the vendor)
- if they could be rationalised (replaced by another application within the estate)
- if they could be migrated to the cloud (if currently on prem).

- In terms of 'health', the following applications are of particular concern:

Adelante

Has not been updated since installation in 2011. The payment page itself on the website looks dated and not as credible as it could be which may prevent some customers from using it. The reasons for this are difficult to establish. The most obvious cause appears to be lack of clarity regarding ownership and governance (who in the business owns the software, IT's role in the management of the software and lack of vendor management). Work is currently underway to plan for the migration to the hosted version of the software. One of benefits of this will be that Adelante will be responsible for the payment gateway aspect of the Council's PCI compliancy. This will be a joint initiative between IT and Finance (and of course Adelante).

Orchard

Its implementation was not fully concluded in 2017 (this was a business led implementation with limited input sought from IT) and was arguably 'superseded' by the Customer First initiative. For several years following Go Live, the management of the software and the vendor relationship was owned by the business. A health check of the software is currently being completed with MRI Software to establish what remediation work is required to improve data quality, what upgrades are required to deliver 'fit for purpose' functionality and what the future application management between the Council and MRI should look like. Orchard has now been acquired by MRI Software who offer a variety of their own SaaS Housing solutions. Additionally, Salesforce have also now established themselves in the Housing space. Given our Orchard contract is set to expire in October 2023, the Council is currently assessing what the future technology needs of the service are likely to be. This will be a joint initiative between IT and Housing.

Mitel

The software installed on the Council's servers dates from 2005 and is now officially out of support (although Britannic do continue to provide technical assistance). An upgrade would cost £8500 but is likely to result in the existing handsets used across the organisation being rendered incompatible. The Council have been planning to replace the existing Telephony solution for some time – especially given that the existing BT provided PSTN lines will be decommissioned in 2025. This is currently at the 'solution design' phase and is being led by a consultancy which specialises in telephony solution design and procurement.

Civica

The Council implemented Civica's document management system in 2001. The contract for the application expired in 2006 but the support arrangement has been renewed annually on a rolling basis. Re-contracting with Civica could expose the Council to a further cost increase in licencing and support. The fact that the Council only recently purchased the deletion module (the platform does not by default support deletion and retention requirements) means that approximately 11 million images have now accumulated in the database. A significant proportion of these are planning documents which we are obliged to retain indefinitely. Over the past 2 years Civica have withdrawn support from 2 key components of the software: My Service Planning (planning document search) and the on premise document image database (migration to the cloud is planned for the end of 2022). The Council has been forced to make vendor-imposed changes as a result of this and the input and support from Civica has so far been poor. An assessment was made in 2020 as to the viability of an alternative solution – principally SharePoint. The decision was made to remain with Civica due to the prohibitive costs to migrate the documents (the Council has no ability to access the images and Civica gave a ballpark cost of around £350,000) as well as the requirement (for Planning) to be able to measure to scale. The latest version of Civica (W3) is a fully hosted platform and the Council has been quoted a price of £60,000 to move to that solution. Given its age, it is likely that at some point over the next 3 to 5 years Civica will announce the Council's existing platform (W2) is reaching end of life and all W2 clients need to migrate to W3. Given Civica's track record for badly managed, expensive, vendor-imposed changes, the Council would be wise to pre-empt this.

- Technical debt is a problem common to council IT (and Tandridge is no exception). As LocalGov.co.uk explains:

  " *Legacy technology absorbs IT resources like a blackhole; a complex set of organisations, processes and policies, evolved over decades, has made digital transformation a mammoth and mercurial struggle and - while citizens might increasingly expect Monzo-like customer experiences from any of their interactions online - unique requirements mean solutions cannot be quickly or easily repurposed from the private sector." ('Breaking the Technical Debt Cycle in Local Government', 27th August 2021)*

- Business led purchasing decisions have resulted in an estate comprised of "best of breed", niche software often requiring complex 'home grown' integration solutions.
- Support for these applications and their integration mechanisms is similarly niche, resulting in limited resilience and development bottle-necks within the IT Team which can have a direct impact on the Council's ability to deliver services. This is due to the integrations mainly being built and supported by the sole IT developer specialist.

- Development of these applications is often dependent on vendor resources, input and agenda, and is therefore expensive and variable in quality.
- Providing a single digital access point to Council services at the customer facing/front end would require yet more integration (and so exacerbates the IT Teams' overhead). Integration solution design is therefore a key aspect for consideration when making decisions regarding the digital road-map.
- The applications which are installed on the Council's network increase the cyber security overhead on the IT Team. As was evidenced in December 2021 following the announcement of the Log4j critical vulnerability. Internal scans found that the Council's on premise technical estate was littered with references to Log4j. Getting vendors to work with us to undertake the required remediation against this vulnerability was further complicated by the fact that we were running aged versions of their software.
- Whilst the overall annual IT software budget for the Council is £850,00, as the application overview table in section 4 demonstrates, over 70% of this spend is on applications owned by the services areas or provided corporately to the organisation. A summary of annual IT spend by key services (when aggregating the cost of the line of business applications and proportional allocation of corporate software costs) looks as follows:
  - Revenues and Benefits: £150,00
  - Planning: £115,000
  - Housing: £110,000
  - Finance: £85,000

Analysis of current network & infrastructure:

This is currently being undertaken in partnership with Microsoft to establish:

- What our existing costs, limitations and challenges are
- What it would cost the Council to move to a hosted infrastructure
- What it would cost the Council to run a hosted infrastructure
- What the benefits of a hosted infrastructure would be
- If a migration proposal is viable

The key challenges of the current **IT Team structure and workload** are essentially due to the condition of the As Is IT estate:

- Resilience is extremely limited due to the niche skillsets required to support and develop the majority of LOB applications. The Team is therefore largely comprised of 'single points of failure'.
- The workload is increased due to the ongoing impact of technical debt – older technology is more likely to go wrong, resulting in an increased support demand and disruption to users.

- The support demand also results in an 'opportunity cost' to the Team of needing to prioritise BAU issues and user support at the expense of being able to maintain and enhance the existing tech provision (where this is possible) which would prevent the issues occurring in the first place.
- The age of the estate also weakens the Council's cyber 'posture' – resulting in resource overhead in capturing and responding to vulnerabilities.

Customer Services

The challenge is to understand how to become a digital first council that enables and empowers people (customers), where possible to engage with us online. This will enable provision of quality services for those who are not digitally enable and/or have complex needs.

To be a more efficient, effective service, the current customer journeys need to improve. But this is not just about providing more on line capability but how to achieve the shift in business processes and ways of working in the wider business so that there is value in the digital solutions.

In general, the customer contact follows four themes;

- Requests about transactions (progress chasers) - these should not exist. Services should be delivered, and updates proactively provided to customers that means people do not call or email chasing for updates.

- Information requests - these should be deflected into the website and the use of "my account" technology eg the balance of council tax account. This requires the content on the website to be upto date, understandable and easy to use.

- Transactional service requests- eg missed bin, pay housing rents etc. Digital channels should be used for all requests.

- Complex service requests – eg vulnerable people, homelessness prevention etc

To gain the efficiencies and enable a reduction in staff answering customer calls there will be a requirement to change business process and ways of working.

The introduction of online digital capabilities will help with this but is not the total solution.

The analysis of the call data is in section 5.1 and demonstrates how digital capability could be deployed to assist with reducing the call volume.

5. Options Appraisal and Review Recommendations

The review has considered the following options:

Option	Description	Pros	Cons	Decision
0. Do minimum	Continue work to rationalise and simplify the current estate including process redesign	Lowest financial risk in short-term Least resource intensive	Limits improvement in resident journey Fails to provide further digital capability Could limit the potential for longer-term digital savings Efficiency targets within the contact team would not be met	Default / fallback position whilst preferred option is considered.
1. Preferred option as set out below	Implement digital tools in partnership with Salesforce	Leaves current underlying infrastructure in place to build on Delivers customer and resident benefits Lowest cost proactive option, since the underlying CRM would remain as-is	By comparison to 'do minimum' introduces a financial risk, dependency on delivering savings	Preferred option provided that budgetary and delivery confidence is secured
2. Replace CRM with a new solution including proposed enhancements	Replace Salesforce as CRM within the Council and build digital tools using the replacement native software	None	Requires wholesale CRM build and migration to be included within the scope of implementation (additional time, cost and risk) Increases the complexity of the architecture (less stable customer journey, support overhead)	

			Need to retain Salesforce anyway for non-CRM functions	
3. Use third-party tools built on top of CRM	Use alternative to Salesforce for chatbots and customer account	Off the shelf solution for chatbot that is knowledge rich	Requires more funding. These costs would be additional to the Salesforce /CRM Build and support complexity would be significant Additional ongoing revenue costs	

5.1 Digital Capability

To deliver enhanced digital capability and further digitise services the Council needs to decide which software options should be considered and whether these would be in addition to or a replacement of existing technology.

As section 4 details, the current IT estate requires further modernisation and a reduction in complexity. As also outlined, one of the key software options for the delivery of the Council's digital ambitions (Salesforce) is already in place and critically its CRM, case management platform and sits behind the majority of the digital capability the Council already has – it therefore already contains approximately 70,000 contacts and associated data.

Salesforce is also the back-office application being used for two key services: waste and planning. This means no integration would be required to support the implementation and use of a digital front-end or Customer Account for those services. Within the application estate, only Salesforce offers genuinely open API architecture, and the IT Team has resiliency to both deliver, support and develop this. This means that where integration is needed to support a digital front-end (particularly for Housing, Revenues and Benefits) at least one side of it will be 'known' and supportable by existing in-house expertise.

Salesforce has a proven track record in the provision of local authority customer accounts and this technology is already being used by a number of other Authorities including: Guildford, Rutland, St Albans, Chesterfield, Eastleigh and Folkestone & Hythe.

Working with Salesforce to explore the *art of the possible*, the Council undertook a series of workshops to establish how the technology could be used to drive down customer contact received via the existing 'non-digital' channels and where possible to deflect contact altogether through the provision of self-service.

The Council's contact centre handles approximately 72,000 calls a year. Of those approximately 23% are abandoned after an average of 5 minutes of waiting which results in repeated call attempts.

The most significant call volumes are received in respect of the following services:

- Housing: 30%
- Council Tax Enquiries: 20%
- Waste: 14%
- Planning: 13%

Typically, call handling times (including wrap-up) range from 7 to 10 minutes.

A review of the available data regarding why people contact the Council has made clear that a reduction in resident contact can be made by providing the following digital capabilities: *[data to be added as an appendix]*

- The ability for residents to have visibility regarding the status of a 'transaction' so they don't need to ask us.
- The ability for residents to advise us of changes/updates in a way that they can easily 'audit' and interact with.
- The ability for residents to be presented with and obtain information easily and quickly when they need to.

Sessions were also held with each customer facing service to identify additional use cases for enhanced digital capability and yielded the following:

Service	Chatbot	Customer Account	Engagement Software
Waste	Provide round data	Provide round data	Bi-directional missed bin notification through channel of choice
	Advise of Biffa access issues	Advise of Biffa access issues	Mass email service disruption info/updates re: snow, strikes, managing agent contact, contamination alerts, round changes
		Advise of service disruptions	
		Annual Assisted collection reviews	
		Submit all service requests	
		Make payments for bins, sacks and bulky collections	
		Welcome pack for new residents	
		Subscribe to service updates	
Planning	Provide application information and pre-app advice	Advise Applicants & Agents of wait times	Advise all Applicants & Agents of timeframes
		Application status indicator	
		Submit additional info/docs	

		Enable residents to view applications local to them and link to enforcement	
		Link to GIS layers to view green belt, TPO's etc	
Elections	How to register, How to apply for a postal vote, Deadlines/timel ine for processes etc	Welcome pack for new residents, Sign-post to Electoral role updates. Opting out of the open register	
Revs & Bens			Reminders, recovery stage alerts
Housing – Tenancy Mgt		View Tenancy agreement, docs and correspondence	
		Submit requests directly to Officers using skills based routing	
		Digitise Home-swapper	
		End of Tenancy process mgt	
Housing - Rents		View rent statements online.	Indicate where HB change means rent balance change.
		Indicate where HB change means rent balance change	Chase arrears by text.
		Set-up direct debits using online form	Remind tenants to pay over: xmas, Easter, school holidays.
Housing - Repairs		Access to gas certs.	Text reminders before repairs appt
			Follow-up surveys.
			Follow-up reminders post repair.
Community & Partnerships			Targeted funding notifications, Warm Hub promotion. Frauds & scams awareness, Event disruptions, Child safety campaigns, Youth provisions to combat ASB hotspots

Analysis is currently in progress to establish:

- The As Is for each of these use cases and associated costs
- The To Be's for these use cases and associated benefits

To deliver these enhanced digital capabilities, the Council would be looking to implement:

- o Chatbot for waste, planning, housing, revenues & benefits, democratic services and community & partnerships
- o A Customer Account
- o Live chat (digital interaction with a Customer Services officer)
- o Engagement software to enable targeted, proactive communication to be made with residents and businesses within the district.
- o Mulesoft: an integration platform which delivers a minimally complex suite of tools that enable the Council's existing and future Salesforce integrations to be standardised, simplified (therefore more easily supportable by the IT Team) and made more robust. This platform would also enable a 'single sign-on' experience to be delivered to residents and businesses using the Revenues and Benefits Portal from within the Council's Customer Account.

Statistics have shown that the implementation of a Customer Account that provides solid 'transactional ability' to residents and businesses within the district can deflect calls and also cases by up to 50% *[data to be added to support assertion]*.

Chatbots have also been proven to similarly deflect calls and cases, but crucially, they are also a powerful tool to generate channel shift *[data to be added to detail assertion]*.

The Council recently undertook a free three month trial of a chatbot solution offered by Inform for the Revenues and Benefits services. When correlating data regarding its usage with access statistics for the resident portal, it was apparent that the Chatbot produced a 30% increase in the usage of the portal *[supporting data to be added as an appendix]*

In addition to Salesforce based solutions, the Council also made approaches to other vendors - specifically in respect of Chatbot solutions as it was recognised that while the Customer Account is best provided using Salesforce (given its existing presence within the Council and the significant overhead of migrating away from the platform to what would likely be an inferior solution), 'out of the box' Chatbots are available and in use by other Councils which could be 'plugged in'.

A good example of this is and one used by: Southampton, Cheshire West and Chester, East Sussex, Telford & Wrekin, Basingstoke & Dean, Surrey, Brighton & Hove and Eastbourne & Lewes is provided by ICS.AI. They offer a cloud-based solution that can be integrated with a Customer Account and also with a range of contact centre software (which is required if the digital interaction needs to result in a call). The ICS.AI chatbot comes with a pre-built database of knowledge resources in respect of each service, that only require review and refinement by the Council. The integration requirements are built by their in-house specialists and this is included in the up-front cost. It would be quick to implement and initially require minimal resources from the business and IT Team.

The drawback of an 'out of the box' solution however, is that while the management of the knowledge resources for that tool may be taken care of within the product itself, the knowledge resources published to the website/available within the Customer Account still require maintaining and updating and additionally syncing to the chatbot database – this would be the Council's responsibility and require ongoing input from the services and IT Team. A more effective approach for the management of the data would be to have a 'single source of truth', needing only to be handled once which could support information being made available:

- via the chatbot
- on the website
- within the Customer Account
- within the CRM for use by officers and call-handlers

Additionally, the provision of a seamless customer experience from website, to chatbot, to account, to call capture within the CRM will be better delivered through the use of the fewest technical components possible. This will result in a less complex integration build and support overhead.

The costs of the ICS solution vs the Salesforce solution have been quantified but may be deemed commercially sensitive, so not included here.

ICS

- o implementation (including API integration)
- o annual licencing which includes unlimited sessions

Salesforce

- o implementation expertise and input would be provided by the Salesforce Implementation Partner and it is expected that the Council's IT resources would undertake approximately 50% of a low-code/no-code build and also assume the ongoing support once live. The Council have received an initial quote from Alscient Ltd who are an established Salesforce implementation partner.
- o annual licencing which is limited to an average of 3,000 sessions per month.

5.2 LOB Application Estate

The review of the Line of Business application estate has obviously identified the remediation work required to ensure that some key applications are fit for purpose and in the best state of health possible. It also produced an assessment of which applications could be replaced by existing software or could be migrated to a hosted or SaaS solution – to support the further reduction of the scale and complexity of the Council's IT estate.

The following table illustrates the findings:

Department	Software name	Supplier Name	Description	Rationalise	Move to hosted
Finance	Adelante	Adelante Software Ltd	Payment Gateway - Annual Maintenance Contract	N	In progress
	Agresso	Sevenoaks District Council	Hosting & support fee for the Agresso system.	N	Potentially
	Eiger Pay Gateway	Bottomline Technologies	BACS transmission gateway	N	Potentially
	Bank Wizard	Experian	Account code checking software	N	N
Housing	Housing Enterprise (Orchard)	MRI Software	Social housing & property management system	Potentially	Y
	Homeswapper	Housing Partners Ltd	Internet-based mutual exchange service	Potentially	N/A
	Civica Abritas	Civica UK Ltd	Social & Homeless Database	Potentially	N/A
	M3 Locator Plus	M3 Housing Ltd	Schedule of rates annual licence fee.	Potentially	Potentially
Customer Services	Mitel	Britannic Technologies Ltd	Mitel Estate supprt	N	Y - hosted solutions being assessed
Democratic Services	Civica Mod Gov	Civica UK Ltd	Meeting and Governance Management Software solution.	N	N/A
	Eros	IDOX	Electoral registration/election management system	N	Potentially - at contract renewal in 2025
	Public-I	Public-I	Webcasting and Audio-Visual	N	N/A
Planning	Conga	App Extremes LLC	Salesforce document production & templating	N	N/A
	iShare	Astun Technology Ltd	iShareMaps,iShare GIS, ADS	N	N/A
	ArcGIS	ESRI (UK) Ltd	Geographical Information Service	N	In progress
	LLPG	GGP Systems	Annual Software licence & maintenance - LLPG.	N	N
Planning Revenues & Benefits	Civica W2	Civica UK Ltd	Document management system, Planning doc viewer & licensing	N	Partial - in progress
Revenues & Benefits	NEC	NEC Software Solutions UK Ltd	Revenue and Benefits software and Citizen Access online portal	N	N/A
	Nominet	Nominet	PSN DNS resolver required for access to Searchlight	N	N/A

Department	Software name	Supplier Name	Description	Rationalise	Move to hosted
Human Resources	I-Trent	MHR (Midland)	Human Resources system	Potentially	N/A
Legal	iKen	Iken Business Ltd	TDC Legal Case and Doc Management Software	Potentially	N/A
	Docusign	DocuSign	Electronic signature software - Business Pro Edition	N	N/A
Communications	Purple Creative	Purple Creative Services Ltd	Website hosting, Design and development	N	N/A
Corporate	Microsoft licencing	Phoenix Software Ltd (reseller)	Licenses for O365, virtual servers & data centre licences	N	Already partial - potentially full
	Salesforce service cloud	Salesforce.com	Enterprise Edition plus basic support	N	N/A
	Form Assembly	VEER WEST LLC	Web forms solution	Potentially - use Salesforce native forms	N/A

To summarise, in terms of key LOB software that could potentially be rationalised and also provided through a hosted solution, the applications used by Housing present the biggest opportunity. This is currently being explored as previously mentioned given the Orchard contract expiry and MRI software offering/road-map. Once an informed assessment has been made regarding the best fit solution, a business case will be submitted for review and approval by Committee.

Additionally, pending further analysis, it is possible that Salesforce could be used as a replacement for both iken and I-Trent (although the use of this software is provided as part of the Midland HR contract for Payroll services).

Before any decisions can be made regarding the future direction of travel for these applications, the Council needs to make a strategic decision regarding its future purchasing of line of business software:

- does the Council want to use fewer applications to run its services (and maximise economies of scale, improve process and data synergies) but accept that there may be functional compromise?

Or:

- does the Council want to retain and pursue 'best of breed' applications, which are bespoke to the needs of the service but with limited and/or expensive integration opportunities and continue to result in a complex estate?

This is not a decision for IT, but one that the Team can provide critical input to, to enable implications to be fully understood. It is also one of the key remits of the recently established IT & Digital Governance Board. Until, however, Service Review outcomes are known and decisions made regarding the future state of

the Council's ambitions for commissioning, it may not be possible for this strategic decision to be made.

To continue it's ambitions to simplify the existing IT Estate, the IT Team will partner with HOS across the organisation to ensure that as contracts come up for renewal or as vendor road-maps demand, line of business applications are moved to hosted solutions.

5.3 Network and Infrastructure

The review of the existing network and infrastructure presented an opportunity to identify further opportunity for rationalisation. As however nearly 50% of the server estate is used to provision LOB application, there is clearly a dependency on the rationalisation of business software.

The key output of the review therefore was the making of an approach to Microsoft to undertake a viability assessment in respect of migrating the on premise server estate to their cloud (Azure) environment.

Microsoft have installed some tooling on the Tandridge network to enable them to capture our hosting requirements and using that they will be able to calculate

- The pre-work required to get our server estate 'migration ready' (for example moving off old Sharepoint servers, migrating from Citrix to the Microsoft AVD solution for application publishing)
- The effort required to migrate to Azure
- The ongoing running costs

Should this analysis, associated costings and resulting benefits prove viable, the proposal will be put forward in a subsequent business case.

5.4 IT Team Structure

- A review of existing IT Team structure can only be undertaken when the future state of Council services and all of the associated IT implications are known.
- If the decision is made to proceed with the recommendations of this business case in respect of the enhanced digital provision, existing IT resources will be required to work with the appointed implementation partner to deliver the build (and therefore result in a further capitalisation of the IT staffing budget in the 2023/24 financial year).
- Furthermore, an assessment will also need to made regarding whether the existing resourcing within the team has the capacity and skill-set to support and maintain the 'to be' when more is known about the build.

6. Structure of Services

Customer services

It is proposed to restructure the customer services team so that the service becomes focused on channel shift, driving the digital agenda and subsequently free up capacity to recognise and respond to those residents that have complex needs, or are not digitally enabled.

To gain the value from the digital tools the team will need to demonstrate and coach customers in the use of self service channels. Be able to facilitate customer access to services and information by promoting and encouraging the digital journey. To confidently provide technical advice to those having difficulties using My Account or the self service channels. This is a different approach for the team who are, in the main, dealing with missed bin complaints and progress chasing calls.

There will be a review of the administrative tasks that the team are carrying out which includes scanning and indexing, this will include process redesign. At times, there has been a gap in service delivery due to a lack of resilience in some areas of activity.

Other key considerations include the high staff turnover of the team. There is an acceptance that customer services roles across the service sector have a retention issue, but in addition it has proven difficult to recruit to the team and several of the posts have been amended to trainee or apprenticeship posts. There is a need to rebalance and redesign the roles to improve the morale and motivation and therefore achieve effective retention and recruitment of staff.

7. Future Service Delivery Models

Hybrid mail

The current mail room operation caters for incoming mail and its processing and the external mail sorting, franking, and outward distribution by Royal Mail.

The hybrid mail solution takes print ready documents or data and creates physical or electronic versions. These are then either printed, enclosed and despatched physically or can be sent for electronic delivery as an email or SMS.

The benefits of using this solution are savings on print, paper, envelopes and postage. There is the additional time saving of the manual task of printing, putting the letters together, franking and collation for the collection by Royal Mail.

The solution will deliver cost benefits of £10K in the first year, with an additional £10k the following year.

Further work is ongoing developing the options for changes to incoming mail. This is to consider the opening, scanning and indexing of incoming documents, however these discussions are at a very early stage. The individual proposals of incoming and outgoing mail should be appraised separately.

The incoming mail (including emails) may reduce considerably when the digital tools are implemented, driving traffic through the website may lead to this solution becoming unviable and would not provide a return on investment.

9. Key Recommendations and Proposals

10. Financial Analysis

Annual software costs

Product	Detail	Licence	Cost PA	Usage	GF	HRA
Engagement Cloud	10M Email, 72K contacts, 420k SMS, Journeys, Landing pages & forms, Adv Studio integrated (4 native channels, email/sms/advertising/push no further integration needed)	45	Individual licence costs redacted	Enables SMS coms	80%	20%
				Supports Customer account sign-up for service specific contact via chosen channel	80%	20%
				Targets residents via social media, email & sms	80%	20%
				Essential for Housing	80%	20%
Experience Cloud	Logins per month	20,001		Customer account	80%	20%
Mobile Publisher	Logins per month	8,500		Mobile app for Customer Account	80%	20%
Einstein Bots	sessions per month 30 blocks of 100	3000		Chatbot	80%	20%
Knowledge	Add on 3 users	3		Knowledge resource for Customer Account and chatbot	80%	20%
Mulesoft	for Salesforce	1		SSO for Revs n Bens online account, data from Housing, data from Revs n Bens. Developed to be used for all TDC Salesforce integration	50%	50%
			£141K total			

	General Fund Total		**£103k**		
	HRA Total		**£38k**		

Implementation and Resourcing:

		GF	*HRA*
Implementation partner:	*£175k (estimate)*	*80%*	*20%*
Website review & redesign & test:	*£10k*	*80%*	*20%*
Website rebuild:	*£20k*	*80%*	*20%*
1 Project Manager FTE approx 1 yr	*£60k*		
	£265k	*80%*	*20%*
General Fund Total	**£212k**		
HRA Total	**£53k**		

The total year-one General Fund cost is £315k with a further £91k for the HRA, totalling £406k. Consideration could be given to capitalising aspects of the implementation project, however given that capital receipts could be applied to the project, in overall terms the accounting treatment makes little practical difference.

Assuming that the project would have an economic life of 5 years following implementation, revenue savings of £222k per annum, (of which £166k General Fund) would be necessary to break even.

Associated General Fund savings of c.£50k have already been identified for delivery in Customer Services, leaving a further sum of £116k in General Fund and c£56k in HRA to identify through increased efficiency and processing time savings.

IT projects are typically seen as high-risk and there have been examples elsewhere in the public sector of costs running higher or savings not being delivered as expected. The Council therefore needs to have confidence that the investment in these Digital solutions is the right thing to do from a resident and customer experience perspective, and that the overall budget and MTFS is sufficiently resilient to manage potential risks.

It is therefore recommended to delay a decision on this investment until the budget has been refreshed following the Local Government Finance Settlement, expected in December. The January committees and February Council meeting will provide certainty that a balanced budget has been set and context for a decision on whether the up-front investment and annual cost is affordable and prudent. The intervening period will be used to ensure an appropriately qualified project manager resource is lined up, mitigating the risk of cost overrun or under-delivery of benefits. Should Members approve the direction of travel, it

will also allow time for remaining savings to be identified and agreed in principle with Heads of Service.

11. Measurable outcomes

Financial
An overall reduction in net budget of 15% by 23-24 over 18 months
An overall reduction in expenditure on 'Enabling and Back Office' functions of 15-20% by 23-24
A higher proportion of the budget is spent on 'front-line' services and the Councils priorities

Residents and Service Users
Service Users are involved in the redesign of services
Resident and Service User feedback and insight is used to drive service improvement
Residents and Service Users are directed to use the least cost channel to access Council services

Services
Service Delivery models are assessed & service delivery is undertaken by the most appropriate means
Service performance is measured, benchmarked and actively managed
Service levels are set at an appropriate level which is aligned to Council priorities

Staff
The Council has a smaller directly employed workforce
Managers and staff are engaged and accountable for their performance
Staff feel valued and motivated and understand the values and behaviours expected of them

11.2 Risk Assessment

Risk	Mitigation
IT Team members with the required skill-sets leave and will be expensive to replace (the team's Salesforce admins have been skilled-up over the past 3 years following implementation).	
Single point of failure for IT integrations	This could be mitigated by the implementation of Mulesoft
Data used for calculating expected benefits is not comprehensive or of poor quality due to limited existing capabilities	External input and analysis to validate assertions and expected outcomes
Required cultural and behavioural changes need to support channel shift are not delivered	The Digital Lead brought in for the purposes of implementation needs to scope these requirements and work with HOS across the organisation to ensure delivery.
Implementation of the technology is not support by the required business process changes and service delivery redesign	The Digital Lead brought in for the purposes of implementation needs to scope these requirements and work with HOS across the organisation to ensure delivery.

Key members of the contact team leave	Staff engagement and formal consultation should be used throughout to address concerns raised by staff. There are benefits to being part of a team that has a wider range of skills based around the new digital tools.
KPI's are not met	During any transition KPI's can fall below acceptable levels.
Hybrid mail solution will not deliver savings	A robust project plan will be in place. Staff engagement across the organisation will be key to this being successful. There will be a communication plan attached to the project plan.