Future Tandridge Programme Business Case

Digital Customer Contact

Project/Service	Investment in Digital Infrastructure for Customer Contact
Approval date	To be considered 30th March 2023
Approval by	Strategy & Resources Committee
Status, i.e. draft, final for review, approved	Draft

Contents

Executive summary

Business Case Model

This document sets out a business case for investment in digital tools to modernise the way in which residents, businesses and customers can contact the Council. It demonstrates that investing in these digital tools is financially viable, deliverable, and will provide a better overall customer experience, including for those that cannot access digital channels. The investment will allow the Council to focus limited resources on those individuals that cannot use digital tools.

The business case is built around the "Five Case Model", recommended as the standard approach for assessing projects by the HM Treasury *Green Book*. The five cases are;

- The Strategic Case
- The Financial Case
- The Economic Case
- The Commercial Case
- The Management Case

The report explains the significance and meaning of each of these in the relevant section, with a definition quoted from HM Treasury guidance. Together, they provide a rounded picture of the project: "Preparing a Project Business Case using the five case model provides decision makers and stakeholders with a proven framework for structured thinking." *(Guide to Developing the Project Business Case – Better Business Cases for Better Outcomes HM Treasury 2018).*

Summary

The primary contact channel provided to residents and businesses within the District is currently the telephony channel.

This channel is overwhelmed and unable to cope with existing demand resulting in an average call 'failure' rate of 25% (which rises to over 30% for some services).

Not only is this channel failing to deal with a significant number of calls received, but the Council is also spending over £300,000 per year supporting this channel for those calls coming into the Contact Centre alone (around 70% of mainline contact).

When looking at why people are calling the Council, it is evident that a better digital offer is required to enable:

- Self-service
- The ability to provide requested information
- The ability to see the status of a request or process

This could deflect a significant proportion of the contact that is currently coming though the telephony channel (30%) and reduce handling costs by at least £135,000 per year.

Savings will also be made by developing enhanced digital transactional capability. For the purposes of the business case a modest provision has been made in respect of these pending full functional requirements analysis and solution design.

The Council should also consider further analysis to be undertaken in respect of the at present 'off radar' contact channels being extensively used across the organisation for the delivery of a wide number of services: emails and direct telephone contact with officers. Currently these are either

uncapturable (direct calls) or unmonitored (emails) and are likely to be constituting in volume at least the equivalent of calls being made to the Council's mainline.

The recommended technical solution proposed by the business case is the further development of the Council's customer relationship management and case management platform Salesforce. Not only does this solution have proven capability in providing digital for other local authorities but it is also the Council's line of business platform for Planning and Waste Services. This provides the opportunity to deliver impactful transactional capability through the provision of a customer account.

The Council needs to define a Customer Contact strategy which should be aligned to its digital contact implementation and be adopted across the organisation.

When developing the strategy, it will be important to consider how we offer support to customers who are "digitally excluded" from accessing services. Barriers to digital participation include a lack of skills, confidence, motivation and internet access. There is a need to ensure that these customers are supported and offered a suitable means of accessing and paying for services. Consulting and supporting customers, especially 'slower adaptors to changes in technology', is an important step towards increasing their digital participation. No current channel of communication will be removed as a result of these proposals. Members will be consulted in developing the Customer Contact strategy.

Recommendations

That committee:

1. Note that the business case is built around the evidenced principle that savings generated will at least cover the cost of improvement.
2. Approve the Digital investment, set out in this report, with total costs set out in the Implementation options and costs section:
   a. The sum of £295k to be added to the capital programme to cover the capital element of the investment
   b. The revenue costs of £35,950 in 2023/24 to be met from Future Tandridge Programme resources as previously outlined and reconfirmed in the Funding Proposal and Budgetary impact section of this report.
3. Note that timing differences between initial costs and subsequent savings from 2024/25 onwards will be built into the wider Council's budget process.

The Strategic Case

The purpose of the strategic dimension of the business case is to make the case for change and to demonstrate how it provides strategic fit.

Context

It is well documented that the most cost-effective customer contact channel is digital. Industry standard data, published by SOCITM and PwC, costs 3 of the most widely used channels as follows:

£10.53 to £14.00 on average for a face-to-face interaction
£3.39 to £5.00 on average for a phone call
17p on average for an online interaction

For the purposes of this business case, the cost to the Council of the use of these channels has been calculated using the data relevant to Tandridge, rather than rely on industry standards. The TDC equivalent costs have been developed through extensive analysis of time spent responding to interactions.

As a publicly funded organisation, the Council has an obligation to deliver services and function as efficiently as possible. It also has an obligation to ensure that the delivery of services and functions are customer oriented – meeting the expectations of our residents and businesses.

The District of Tandridge has a relatively high proportion of digital enablement, with recent surveys putting this at around 80%. The Council's website receives on average 70,000 visits a month, with 50,000 of these being unique.

Whilst the Council does have some digital contact capability (largely online forms and a Revenues and Benefits Account), these are not a comprehensive set of tools. The online forms are limited and are not scalable. The Revenues and Benefits account is a transactional portal where people can submit applications for discounts, benefits etc but it doesn't enable contact or provide a view in to where a transaction or application might be in terms of status – and so people are still calling.

In June 2021, the Council set out 3 ambitions in respect of its Digital Strategy, which was approved at S&R committee on 6 July 2021:

"Accelerate 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."

"Work 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."

The Future Tandridge Programme has provided an opportunity for a review of customer contact channels to be undertaken, with a view to determining if the implementation of a more comprehensive digital provision could:

- Support the more efficient delivery of services and functions at a lower cost to the Council.
- Enable people to access services and information when they want and online.
- Contribute to consolidating and standardising our current technology estate with improved integration and connectivity between core systems.
- Free-up congested existing channels so that these can be used by the people who need to use them.

Existing Customer Contact Overview by Channel

Telephony

The Council receives approximately 100,000 calls a year to its mainline number split as follows across the services:

IVR	Receiving Service	Call type	Received	%*	Abandon-ment %	Abandoned	Calls Handled
General	Customer Services	Housing	22,101	31	26.11	5,771	16,330
		Planning	9,405	13	26.11	2,456	6,949
		Misc	15,518	22	26.11	4,052	11,466
Waste & Recycling	Customer Services		9,912	14	28.09	2,784	7,128
Ellice Rd Car Park	Customer Services		772	1	0.65	5	767
Council Tax Enquiries	Customer Services		14,053	20	9.51	1,350	12,703
Sub total			**71,761**	**100**	**22.88**	**16,418**	**55,343**
Council Tax Recovery	Council Tax		13,821		10.68	1,476	12,345
Housing Repairs	Housing Repairs		8,642		8.32	719	7,923
Benefits	Benefits		6,712		14.56	977	5,735
Business Rates	Council Tax		2,036		22.05	449	1,587
Sub total			**31,211**			**3,621**	**27,590**
Grand total			**102,972**			**20,039**	**82,933**

Percentage of calls received into the Customer Services team.

As the statistics clearly show, the Council is currently receiving 20,000 calls a year more than it can deal with, so around 20%. When looking at the abandonment rates applicable to those calls handled within the Customer Services Team, that rate rises to an average of 23%.

The call 'failure' percentage further increases when factoring in those calls answered by Customer Services needing to be passed on to the service areas which are unsuccessful (and result in a 'call back' request being created in Salesforce). Therefore, increasing the call 'failure' to over 30% for some services.

This business case has required further investigation to be made in to why people are contacting the Council through the telephony channel to try and identify how this contact may be resolved using alternative channels or deflected altogether through the provisioning of better digital capability to the Council's customers.

Telephony Contact Analysis and Cost summary:

Analysis undertaken on the volumes of calls received by the Council on the mainline number has identified that people are making contact for the following reasons:

	Request for info	Status	Provision of info	Transactional
Housing	17%	7%	17%	49%
Planning	25%	25%	17%	34%
Council Tax Enquiries	30%	9%	37%	24%
Waste & Recycling	26%	39%	34%	2%
Average	**24%**	**20%**	**26%**	**27%**

This analysis is fully detailed in Annexe A.

Each type of call was 'costed' in terms of handling time and, when aggregating the totals from the call analysis detailed in Annexe A and sub-totalling by the 'purposes' used for categorisation, the annual costs have been calculated as follows:

Service	Call Types	Cost (£)
Housing	Status checks, requests for info, provision of info	£62,480
	Complex transactional	£118,558
Planning	Status checks, requests for info, provision of info	£11,719
	Complex transactional	£12,775
Waste	Status checks, requests for info, provision of info	£28,545
	Complex transactional	£246
Council Tax Enquiries	Status checks, requests for info, provision of info	£53,208
	Complex transactional	£20,215
Sub totals	Status checks, requests for info, provision of info	£155,953
	Complex transactional	£151,794
Total		**£307,747**

Status checks, requests for info and provision of info were totalled together as these are the call types that could be deflected to digital.

Complex transactional are likely to be further automated and handling times therefore reduced but until technical requirements' analysis has been completed it is prudent to make a more conservative estimate regarding the efficiencies and so these were split out.

Whilst the above table includes Council Tax Enquiries (as this IVR line is handled by Customer Services) it does not include the 3 other Revenues and Benefits IVR lines (Council Tax Recovery, Benefits and Business Rates) which are answered by the services themselves. The reason for the

exclusion is that the call recording exercise that has been used for the purpose of this analysis (a manual recording of call details in spreadsheets) was only completed with Customer Services.

Given that these other IVR lines receive around 22,000 calls annually, further investigation is needed (to be undertaken within the scope of the Digital initiative) to identify additional savings opportunities that may be available by channel shifting this contact.

Telephony Contact Channel Challenges/Digital Opportunities

Customer needs and expectations
- To contact the Council, residents have no choice other than to call, email the or use the Council's general enquiries form.
- The high call 'failure' rate for Housing (over 7,700 calls per year) means that vulnerable people or people for whom telephone contact is the only option are similarly not able to get through.
- Residents are unable to 'interact' with processes or applications so to advise of an update, provide information etc they have no choice but to call or use the Council's general enquiries form (see below).

Council efficiency and service delivery
- Time is being spent handling information requests which could be 'self-served' if the capability existed.
- Time is also being spent handling calls where the resident has been asked by the Council to provide information – these could also be transacted digitally.
- Status checks/requests are similarly potentially avoidable and could also be resolved digitally.
- Requests for contact with specific officers are currently using Customer Services as a 'switchboard' and thereby the Council is double handling the call, at the expense of being able to take another call.
- In addition, up to 25% of these are unsuccessful meaning the call is unresolved and more work required to request a return of contact, which is also undertaken at the expense of being able to take another call.
- Transactional requests being initiated through telephone contact for Housing are recorded only in the Housing back-office applications (Orchard & Abritas) and not captured within the Council's Corporate CRM (Salesforce). There are no integrations between these applications (i.e between Orchard and Abritas), or between either of them and Salesforce. Customer Services are therefore needing to log in to multiple screens when handling calls.
- Contact volumes in respect of the Housing services compared with the service's user numbers are high:

Service	User numbers	Annual Calls
Waste	78,000 collections per week	10,000
Council Tax	38,000 households	28,000
Benefits	5,328 (combined HB and CTRS case load)	7,000
Housing	3,900 (properties, leaseholders & garages)	30,000
Business rates	2,900 businesses	2,000
Planning	2,100 applications annually	9,500

Telephone contact currently being made directly to Officers is completely invisible to the Council. Meaning it is not possible to capture, track and understand:

- Why people make contact
- Who has made contact
- Typical resolution times
- The demand burden this places on services
- Where service improvements may be required
- What this is currently 'costing' the Council
- The true cost of the provision of services by the Council
- Where any associated work might be in terms of status that is related to the contact
- What % could be resolved digitally and therefore deflected
- What % could be automated by routing it through a digital contact platform

Online form submissions

1. Housing

The Housing service offers minimal provision in terms of digital tools. Residents can access a Homechoice account (Abritas) for choice-based lettings and mutual exchanges, but customer contact is principally transacted and managed using telephone, email and paper documents.

Existing digital contact with the Council in respect of Housing is principally made using the Council's online General Enquiries form (which creates a case in Salesforce). Automation, workflow and reporting capability is however severely limited as the form is designed to be as generic as possible and is largely free text.

Volumes & Purpose

The Council currently receives approx. 1,000 general enquiry submissions annually and analysis undertaken shows that people are using it for the following reasons:

Information request	30%
Status check	10%
Provision of information/documentation	12%
Transactional	18%
Anti-social behaviour report/issue	20%
Repair/maintenance request/issue	10%

Cost

The cost of this contact is difficult to quantify but what can be seen when reviewing the enquiry details is that almost all information requests and status checks are asking for a Housing Officer to make contact via email or phone.

Similarly, those which are transactional are also like to result in 'returned' contact, so additional calls and emails.

Using the average of the metric calculated for typical call handling times and associated Housing Officer costs, if each of these was responded to with a call the total cost of these would be calculated at: £7.50 x 600 = £4,500.

2. **Planning**

The Planning Service offers some provision in terms of digital capability. 80% of Planning applications are received through the national Planning Portal and these create cases in Salesforce with associated workflow and automations. Applicants and Agents are able to engage with the Planning department using email, and this contact can be recorded in Salesforce against the case.

Similarly, the Council has an online form for the reporting of suspected breaches and land charge search requests which also create cases in Salesforce.

As we cannot authenticate users though, it is not possible for Applicants and Agents to directly access their case details to provide additional documentation or information or obtain status updates. Neither is it possible for residents and agents to make use of the data integrations available within Salesforce for Planning (specifically spatial information from GIS) to enable them to self-serve.

Volumes & Purpose

The Council currently receives approx. 700 submissions of General Enquiries for Planning annually and analysis undertaken shows that people are using it for the following reasons:

Status checks	30%
Requests for basic planning information	50%
Requests for complex information or transactional interaction	14%

When reviewing the enquiry details in respect of basic information requests, a significant amount of the information being requested (largely confirmation of whether Planning would be required and property or land specifics) could be made available online or better sign-posted to using a 'specific question and answer' service.

Cost

As with Housing, the cost of this contact is difficult to quantify but what can be seen when reviewing the enquiry details is that almost all information requests and status checks are asking for the Planning department to make contact via email or phone.

Similarly, those which are transactional are also like to result in 'returned' contact, so additional calls and emails.

Using the average of the metric calculated for typical call handling times and associated Planning Officer costs, if each of these was responded to with a call the total cost of these would be calculated at: £3.53 x 560 = £1,976.

Existing General Enquiries form provision challenges/Digital opportunities

- 52% of form submissions for Housing are in respect of:
  - o information requests (e.g. in respect of a tenancy agreement or seeking information regarding how to do something)
  - o status checks, looking for an update on an in-flight transaction/process
  - o providing us with information we have requested from them in order to progress an in-flight transaction.

  All of these types of contact can be digitised.
- 80% of form submissions for Planning are in respect of status checks and requests for simple planning information. Again, these could be digitised.
- For Housing, a lack of integration capability between Salesforce, Orchard & Abritas means that work is potentially being 'triple-handled' and completed in up to 3 applications.
- Without authentication (concept of 'user' and identity proving function), there is no capability to be able to give residents a window in to where the request is at or enable them to interact with it (provide information required, documentation etc).
- The online form is essentially a digital message taking service and does not currently deliver any workflow, automation or transactional capability.
- Contact being made using this form is difficult to capture and report on due to the generic nature of the form.
- The General Enquiries form is used across all public facing services and the Council receives an average of 5,000 per year. It is expected that a vast majority of this could also be deflected or automated.

Emails

1. Housing

Summary

The Housing department receives approximately 56,000 emails annually and this is split as follows across the services:

- Housing needs: 28,000
- Housing rents: 2,200
- Tenancy management: 8,000
- Housing repairs: 18,000

The volume of contact going through this channel suggests that a significant proportion of customer contact is taking place in officers inboxes.

2. Planning

Summary

The Planning department receives approximately 25,000 emails annually, the statement above regarding the use of this channel by Housing is also applicable to Planning.

Email challenges/digital opportunities

Emails are deceptive as whilst they can be less time consuming/costly than a call (although this is not always the case), they offer little capability or opportunity in respect of automation, workflow or self-service. Additionally, we have virtually no ability to capture, track and understand:

- Why people make contact
- Who has made contact
- Typical resolution times
- The demand burden this places on services
- Where service improvements may be required
- What this is currently 'costing' the Council (and therefore the true cost of the provision of services by the Council)
- Where any associated work might be in terms of status that is related to the contact
- What % could be resolved digitally and therefore deflected
- What % could be automated by routing it through a digital contact platform

Additionally, in the event of the absence of the Officer responsible for the inbox, work cannot easily be handed over or dealt with by alternative resources with the required amount of detail and visibility.

Given the significant volumes of contact being put through this channel, the Council will need to undertake the required analysis to identify if it offers further opportunities for efficiency gains and cost savings in the event of the Digital proposition being agreed. It is expected that these could be considerable.

If a basic assumption was made using the average %'s of why customers make contact using the Telephony channel, the email analysis would calculate as follows:

	Request for info	Status	Provision of info	Transactional
Housing	9,520	3,920	9,520	27,440
Planning	6,944	6,944	4,648	9,464
Totals	**16,464**	**10,864**	**14,168**	**36,904**

Website

The website receives on average 70,000 visitors a month and 50,000 of these are unique. Over the past 9 months the Tandridge website had over 2.6 million web pages viewed, and the main home page was viewed 237,262 times and shows that our customers will also navigate directly to the service area that they require without going through the main TDC home page. Full details regarding the statistics can be found in Annexe B.

Walk-ins

Around 100 people per month visit the Council Offices. This data has only recently started to be collected and the Council needs to ensure that it is able to understand why people are visiting the building so that the provisions on site can meet with their needs. Further details regarding the statistics can be found in Annexe C.

Digital Customer Contact: the brief

The Council needs to define a Customer Contact strategy which should be aligned to its digital contact implementation, the Council's Digital Strategy and be adopted across the organisation.

When developing the strategy, it will be important to consider how we offer support to customers who are "digitally excluded" from accessing services. Barriers to digital participation include a lack of skills, confidence, motivation and internet access. There is a need to ensure that these customers are supported and offered a suitable means of accessing and paying for services. Consulting and supporting customers, especially 'slower adaptors to changes in technology', is an important step towards increasing their digital participation.

The strategy will identify how to specifically target communications to geographical and/or demographic audiences. Higher digital usage can be used to reduce operational costs by promoting self service options and make use of digital correspondence to remove the need for human input. Higher digital usage will also support green initiatives such as reduced paper waste and energy consumption.

The channel shift objective would be to change the way customer services are delivered, where customers choose to transact digitally when accessing and paying for services. Increased digital usage can be leveraged in many ways, it will be possible to easily promote council initiatives and revenue generating services to a wider audience in a quick and convenient fashion with minimal cost. No current channels of communication will be removed.

To define and develop the strategy there will engagement and consultation with customers, stakeholders, members, service heads and officers and the development of a structured set of design principles, which will include:

- options for being able to identify the most vulnerable residents so they can be prioritised

- reduce the number of calls being received by all services to address the existing abandonment/failure rates and deliver a better level of service to residents

- telephony channel to be kept as uncongested as possible and freed-up for those who must use this channel

- customers to be provided with a "digital window" into the delivery of their services and the ability to find out information relation to the provision of their services without having to make telephone, form or email contact to check on the status of a transaction or application

- customers to be provided with the ability to interact digitally with their service provision so they can advise us of changes, provide information requested and supporting documentation without having to make contact

- digital customer interaction to be leveraged to increase service delivery automation

- further integration between key line of business applications and the Council's CRM needs to be developed to support digital interaction

- customer services need a more comprehensive view of customers in the corporate CRM so they can more easily resolve calls at first point of contact

- less reliance on the use of individual officer's email inboxes as a mechanism for service delivery

- harness the existing website audience by giving them more tools to use when they visit

- a better level of reporting and data capture regarding why and how residents make contact to ensure the continuous improvement of service delivery and that its customers' needs can be prioritised.

Solution Design:

1. **Digital Strategy**

In addition to brief outlined above, the solution design needs to align with the principles of the Council's digital strategy and therefore:

Accelerate channel shift
This means not only delivering the digital contact capability but also supporting its uptake and adoption and reducing the demand on existing non-digital channels.

ICT modernisation and resilience
The Council needs to build additional digital capability on the technology foundations that are already in place to support Customer contact – providing they are fit for purpose and cost effective.

Work smarter
The Council needs to ensure that the adoption of a digital contact solution is championed across all customer-facing services at all levels of the organisation and that its usage is supported by clear adoption and customer contact strategies.

2. Salesforce at the Council

The Council has been using Salesforce for CRM (Customer Relationship Management) and case management since February 2019. It currently supports the usage of approximately 50 online forms and the management of approximately 68,500 cases annually.

In October 2021, the Planning service started using the Salesforce instance implemented for CRM and case management as their line of business application, migrating off the Arcus provided instance.

In April 2022, the Council went live with the new waste contract which required a comprehensive set of integrations to be built between Salesforce (which is used for the Customer contact aspects of the Waste service) and Biffa's waste management platform Whitespace.

In addition to Whitespace, Salesforce is also integrated with the spatial data layers provided by GIS, the LLPG, Google maps, the national Planning Portal and the Council's online payment gateway.

Salesforce was also instrumental in enabling the Council to quickly respond to the needs of residents and businesses during the pandemic. In house capability to quickly design, build and deliver forms enabled the Council to make online forms for grant applications available within days. It was also used to capture and track contact made with our most vulnerable residents during lockdown.

3. Salesforce at other Councils

A number of other Councils use Salesforce as a CRM and case management platform and have also chosen to use its software for the provision of a customer account (Guildford, Rutland, St Albans, Chesterfield, Eastleigh and Folkestone & Hythe).

Guildford, St Albans and Eastleigh have achieved sign-up rates of around 80% of households within their jurisdictions.

St Albans is similar in size to Tandridge and they also use the MRI Orchard Housing system and the NEC Revenues and Benefits system and customer portal (this links directly into their 'My Account').

They went live with their Customer Account in 2017 and now have 74,000 accounts - with 49,000 of 69,000 households having registered for an account.

They recently revisited their channel shift strategy and from June 21 to May 22 have seen a shift in terms of how their customers are communicating with the council. Their digital contact grew from 16% to 25%; incoming emails reduced from 54% to 43%; incoming post reduced by 3%, from 4% to 1%:

Channel analysis (whole council)

June 2020 – May 2021

Channel breakdown between 1st June 2020 and 31st May 2021.

Online	Telephone	Email	Face to face	Post
16%	27%	54%	0%	4%

June 2021 – May 2022

Channel breakdown between 1st June 2021 and 31st May 2022.

Online	Telephone	Email	Face to face	Post
25%	29%	43%	3%	1%
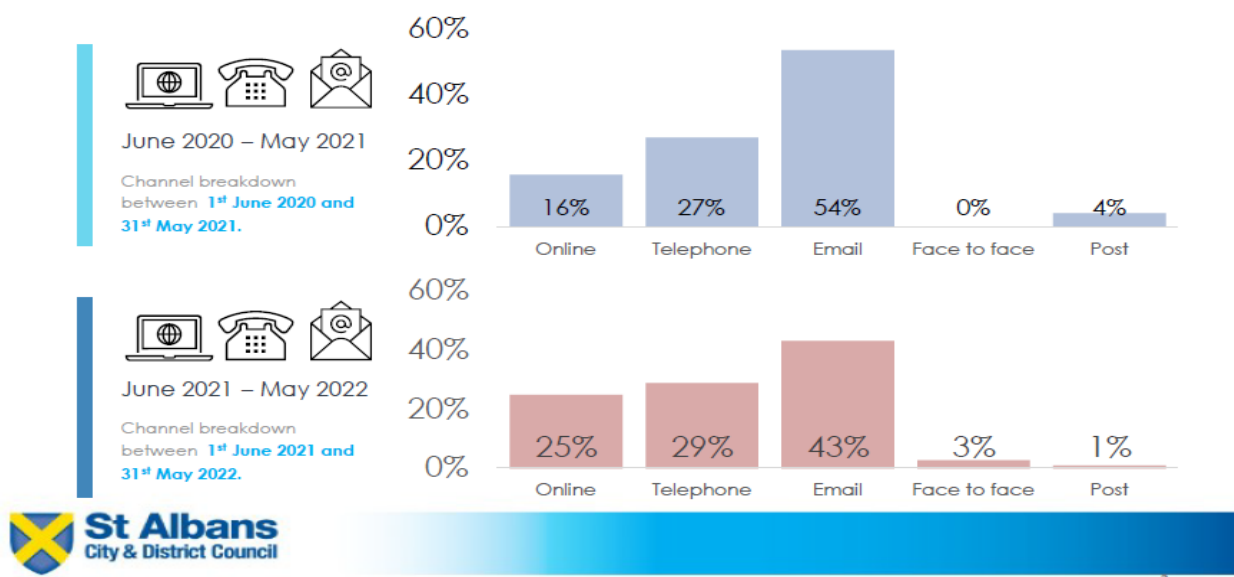
It is important to note that St Albans have not yet gone live with case management in Salesforce (this is currently in progress) and so the As Is transactional capability offered by their account is limited.

4. **Salesforce as a digital contact solution**

The Salesforce offering is a platform solution designed to provide a variety of functionality depending on the licence types that are active within the 'org'. The existing Tandridge org will be enhanced to enable a 'packaged' customer view (the Account) with access privileges to be able to view data and perform actions as we define/permit.

The below screen shot has been taken from the St Albans account and gives an example of how this can be presented to the user:
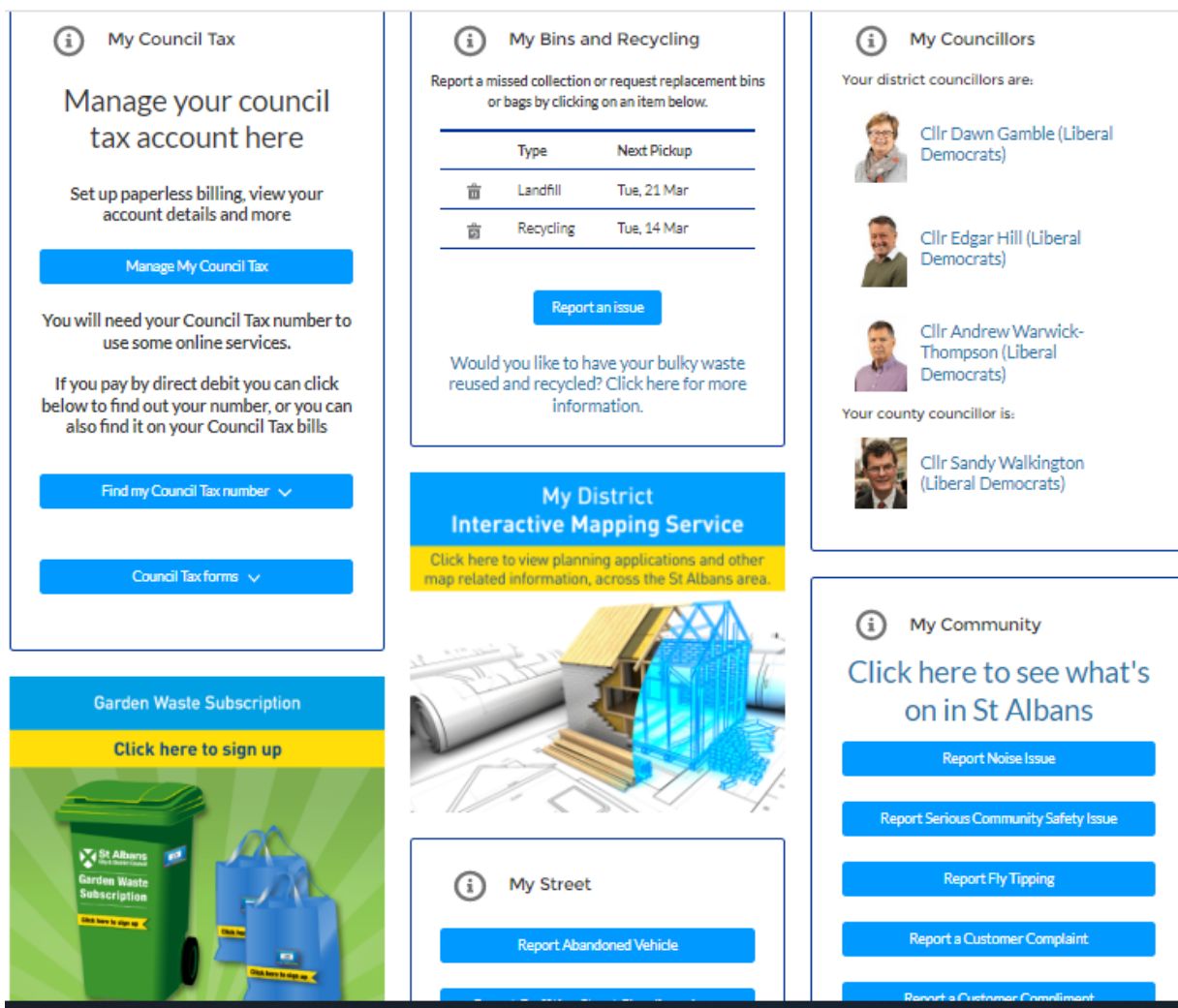
In addition, the Council will also be looking to implement a chatbot which can be used to sign-post to all the resources available on the website. It will also be used to drive channel shift, with users being able to log-in and create accounts from within the chat window.

The integration aspect (primarily between Orchard, NEC and Salesforce) will be delivered using a low code solution that will also be used to house the existing integrations the Council's IT Team have built with Salesforce. This will deliver a significant gain in terms of resilience as currently most of the Salesforce integrations are supported by only 1 resource within the Team.

The Council should also consider the usage of GOV.UK notify. This is a free service provided by central government to local authorities which enables one-way sms notifications to be sent to customers and is easily integrated with a Salesforce customer account.

5. Alternatives to Salesforce

The only equivalent alternative to the Salesforce proposition being considered by this business case is Microsoft's Dynamics. The licence costs are however within 10% of each other so there would be no real financial benefit to be gained. Furthermore, to avoid the user and technical pitfalls of a 'mixed provider' solution, the Council would likely have to consider moving its existing CRM and case management provision to Dynamics as well - which would be both costly, disruptive and need to be

completed before a Customer Account build. The Council would also then be faced with having to source a new Planning line of business application (to avoid having to continue to pay for Salesforce licensing), again at additional disruption, cost as well as losing the benefits of having a Customer Account built in the same software as the Planning line of business application.

Use Cases (As Is vs To Be)

Initial workshops have been held with representatives from the customer-facing services to identify some key use cases that the account and chatbot business requirements would be focussed on:

Service	Chatbot use case	Customer Account use case	As Is
Waste	Provide round data	Provide round data	Must navigate the TDC website and then enter postcode to retrieve collection round data
	Advise of Biffa access issues	Advise of Biffa access issues	Information passed through from Biffa Whitespace system, but currently no longer loaded on to the website to view due to staff resources
		Advise of service disruptions	Information passed through from Biffa Whitespace system, but currently no longer loaded on to the website to view due to staff resources
		Annual Assisted collection reviews	Manually reviewed by TDC staff through spreadsheets and Salesforce reports and checking with Biffa. Currently a very manual process
		Submit all service requests	Online forms with no authentication
		Make payments for bins, sacks and bulky collections	Contact TDC over the phone or order through the website and pay, but not a smooth and easy process for customers
		Welcome pack for new residents	Currently no longer happening due to resourcing
		Subscribe to service updates	Not available at present
	Opportunity to bring the Garden Waste Scheme back in-house to 'Sign up / renew Garden Waste Scheme'.	Opportunity to bring the Garden Waste Scheme back in-house to 'Sign up / renew their Garden Waste Scheme. Through the online account. (Opportunity to drive take up if must have an online account).	BIFFA currently run the Garden Waste Scheme
Planning	Provide application information and pre-app advice	Advise Applicants & Agents of wait times	No proactive advice given to applicants and agents regarding their planning applications status and wait time. They must either email or telephone TDC to get the latest status. Normally these telephone calls will have to be transferred to the Planning department by

Service	Chatbot use case	Customer Account use case	As Is
			Customer Services and tie up the CS advisor for several minutes whilst trying to transfer the call or if unsuccessful creating a call back request to the team to contact the applicant / agent.
		Application status indicator	As above.
		Submit additional info/docs	Email or via the Planning Portal which cannot auto-index the documents in Civica and requires manual processing
		Enable residents to view applications local to them and link to enforcement	Map search on the Tandridge website, does not show enforcements though.
		Link to GIS layers to view green belt, TPO's etc	Not provided
Elections	How to register, How to apply for a postal vote, Deadlines/timeline for processes etc	Welcome pack for new residents, Sign-post to Electoral role updates. Opting out of the open register	Not provided
Revs & Bens		Benefit application status indicator	No proactive advice given to applicants or (where applicable) their landlord regarding their Benefits applications status and wait time. They must either email or telephone TDC to get the latest status. Normally these telephone calls will go direct to the Benefits IVR group but can go through Customer Services if they wanted to speak to someone in the Housing Department as they believe they deal with the Benefits applications. This ties up the CS advisor for several minutes whilst trying to transfer the call or if unsuccessful creating a call back request to the team to contact the applicant / landlord.
Housing – Tenancy Mgt		View Tenancy agreement, docs and correspondence	Tenant must phone up, email TDC or complete general enquiries form on the TDC website requesting a copy of these documents
		Submit requests directly to Officers using skills based routing	Not provided
		Digitise Home-swapper	Not provided
		End of Tenancy process mgt	No online provision
Housing – Rents		View rent statements online.	Tenant must phone up, email TDC or complete general enquiries form on the TDC website requesting a rent statement.
		Indicate where HB change means rent balance change	Tenant receives new Housing Benefits letters in the post and must phone up, email TDC or complete

Service	Chatbot use case	Customer Account use case	As Is
			general enquiries form on the TDC website requesting a rent statement or rent balance and what they need to now pay each week.
		Set-up direct debits using online form	Tenant must complete a paper-based version of the direct debit mandate form and sent it back to TDC. Income Officers will need to set up the DD manually in the MRI Orchard Housing system.
Housing – Repairs		Access to gas certs.	Tenant must phone up, email TDC or complete general enquiries form on the TDC website requesting a copy of the gas certificate.

The Finance Case

The purpose of the financial dimension of the business case is to demonstrate the affordability and funding of the preferred option.

Implementation Options and Costs

1. Phased vs Combined

When assessing the solution options and potential implementation approaches, consideration was made to simply starting with a website chatbot and then ramping-up digital capability using a phased approach.

The challenge with this is that the chatbot on its own delivers a limited set of benefits, the table below provides an overview:

Saving/Benefit	Account	Chatbot
Significantly reduce information request calls and contact	Y	Y
Significantly reduce 'status check' calls and contact	Y	N
Provide enhanced digital transactional capability for Planning	Y	N
Provide enhanced digital transactional capability for Waste	Y	N
Provide visibility on Housing data and documents and potentially some transactional capability	Y	N
Provide single point of digital contact for residents and businesses to obtain information relevant to them and engage with us when needed	Y	N
Build a better view of residents and businesses to help the Council understand their needs and expectations which can inform service design and delivery	Y	N

	Y	N
Build a better view of residents to support first point of contact resolution where possible	Y	N
Relieve pressure on existing contact channels so that these can be more effectively used by those who need to use them	Y	Y
Signpost existing website resources more clearly	Y	Y

In addition, some costs would be increased as the overall implementation timeline would need to be extended: a chatbot implementation on its own will take around 6 months (from procurement to go live) and the customer account is expected to be completed within 15 months – so 21 months in total. To run them as one project means undertaking a single procurement phase and benefits from economies of scale at each stage of the project lifecycle in terms of work, resourcing and output. Meaning the chatbot could be delivered 3 months following the go live of the account (so within 18 months).

These two initiatives complement each other and are best developed concurrently. Also, the planning and requirements gathering activities of these are best completed at the same time to minimise waste. The chatbot will be 'intelligent' and direct queries to the relevant service through a decision tree, this will ultimately feed into a transfer to call functionality. This is also another example of how we will leverage higher digital usage to minimise calls using customer services as a switchboard and freeing up agents.

The table below presents a summary of the costs associated with each approach:

		Capital	Revenue	Year 1 23/24	Year 2 24/25	Year 3 25/26	Year 4 26/27	Year 5 27/28	Over 5 years
Phased: Chatbot then Account	PM	105,000		60,000	45,000				105,000
	Imp partner	210,000		120,000	90,000				210,000
	Licence costs		89,100	45,575	68,600	89,100	89,100	89,100	381,475
	Website redesign	10,000		10,000					10,000
	Website rebuild	20,000		20,000					20,000
	Ave Annualised cost	**145,295**		**255,575**	**203,600**	**89,100**	**89,100**	**89,100**	**726,475**

		Capital	Revenue	Year 1 23/24	Year 2 24/25	Year 3 25/26	Year 4 26/27	Year 5 27/28	Over 5 years
Account & Chatbot together	PM	90,000		60,000	30,000				90,000
	Imp partner	175,000		131,250	43,750				175,000
	Licence costs		89,100	35,950	68,600	89,100	89,100	89,100	371,850
	Website redesign	10,000		10,000					10,000
	Website rebuild	20,000		20,000					20,000
	Ave Annualised cost	**133,370**		**257,200**	**142,350**	**89,100**	**89,100**	**89,100**	**666,850**

It is therefore recommended that the Council undertakes a combined implementation which will be more cost-effective and quicker to realise benefits.

The annualised cost over a 5-year initial life of the project would be £133,370 per annum, including the recurring licence costs and the up-front costs repaid in equal instalments.

The implementation costs include 20% contingency on the implementation partner and website redesign and rebuild.

Funding Proposal and Budgetary Impact

General Fund:	Year 1 23/24	Year 2 24/25	Year 3 25/26	Year 4 26/27	Year 5 27/28	Over 5 years	
Capital	48,000	24,000				72,000	PM
	105,000	35,000				140,000	Imp partner
	8,000						website redesign
	16,000						website rebuild
Capital total	177,000	59,000				212,000	
Revenue	21,200	44,800	61,200	61,200	61,200	249,600	Licence costs
Total General Fund	**198,200**	**103,800**	**61,200**	**61,200**	**61,200**	**485,600**	

HRA:	Year 1 23/24	Year 2 24/25	Year 3 25/26	Year 4 26/27	Year 5 27/28	Over 5 years	
Capital	12,000	6,000				18,000	PM
	26,250	8,750				35,000	Imp partner
	2,000						website redesign
	4,000						website rebuild
Capital total	44,250	14,750				53,000	
Revenue	14,750	23,800	27,900	27,900	27,900	122,250	Licence costs
Total HRA	**59,000**	**38,550**	**27,900**	**27,900**	**27,900**	**181,250**	
Capital Total	**221,250**	**73,750**	**0**	**0**	**0**	**295,000**	
Revenue Total	**35,950**	**68,600**	**89,100**	**89,100**	**89,100**	**371,850**	
Overall Total	**257,200**	**142,350**	**89,100**	**89,100**	**89,100**	**666,850**	

It is proposed that the capital elements of the cost are added to the capital programme. This will be funded by borrowing which will be repaid after implementation through the revenue savings to be delivered by the project.

The year 1 revenue costs of £35,950 will be managed through Future Tandridge Programme resources, as set out in section Section 6 of the covering report. Future revenue costs, including the revenue costs of borrowing will be managed through the wider budget process and ultimately met by associated savings. Inevitably costs will be incurred ahead of savings and this timing difference

will be managed through the wider budget process to avoid services being required to make savings before the benefits are realised.

Ultimately, services will recognise time savings as a result of these proposals, as set out in the Economic Case, which will need to be at least sufficient to cover the up-front investment and annual costs. At a high level, the annualised cost of £133k as set out in the table above would require a reduction of between 4 and 5 FTE across the Council. Work will be necessary to redesign services around the delivery of these savings.

The Commercial and Management Case

The purpose of the commercial dimension of the business case is to demonstrate that the preferred option will result in a viable procurement and a well-structured Deal between the public sector and its service providers.

Connected to this, the purpose of the management case is to demonstrate that robust arrangements are in place for the delivery, monitoring and evaluation of the scheme, including feedback into the organisation's strategic planning cycle.

1. Implementation Approach

The Council will be looking to engage the services of an implementation partner who can demonstrate a successful track record in the build and delivery of chatbots and accounts using Salesforce technology. Preference will be given to those who have experience of working with other Local Authority Salesforce clients.

The implementation partner will supply project management resources (to work alongside the Council's project manager/Digital Lead) as well as technical resources who will both build/test the technology and upskill the Council's existing Salesforce technical resources who will complete approximately 50% of the build. This will also enable the ongoing support and development of the digital provision to be provided in-house.

The first phase of the project will be focussed on the procurement of the licencing (including a review of all pricing which was provided to the Council in September 2022) and also ensure the Council will only be paying for what it needs when it is needed. It will also focus on the appointment of a suitable implementation partner.

In parallel to the procurement phase should also be a deeper dive into those areas of savings opportunities that have been identified within this business case as needing further exploration along with detailed requirements gathering for those saving opportunities that have been captured.

Both of these will be led by the Council's Digital Lead/Project Manager who will be recruited to work alongside the senior business analyst (who has been instrumental in the building of this business case) and supported as required by subject matter experts from across the organisation.

The Economic Case

The purpose of the economic dimension of the business case is to identify how the proposal delivers best public value.

In the case of the Digital Investment, that value is demonstrated through a reduction in the cost to the Council of handling calls. The business case should demonstrate that the change at least offers a break-even position by comparison to the implementation cost. The economic case should also include reference to the non-financial factors associated with the business case; i.e .that customers will be able to resolve queries more readily at a time of day that suits them and without needing to contact the Council directly unless they wish to do so.

The economic appraisal section would typically include a discounted cash flow. Discounted cashflows lend themselves best to projects with long-term paybacks where inflationary impact on values makes a significant difference. The project expects a relatively short pay-back period of 5 years from implementation. The report has focussed on establishing the break-even point, and giving confidence to members that it will break even. This is based on the call reductions set out (of 80% reduction in straightforward contact, but only a 10% reduction in more complex queries). On the latter in particular, the benefit may be much higher. Crucially, the report only quantifies savings from the calls that go through Customer Services. A significant proportion of contact is likely to go directly to services. These have not been quantified in the business case and further savings are therefore very likely. The business case focusses on break-even because the Council cannot justify the cost or time involved in identifying these further savings without Member approval to proceed. In particular, the project management resource would be required to work with services to quantify the full impact. It is proposed that the business case be approved on the basis of break-even with future reports brought back to committee updating on the full impact.

Digital Customer Contact: outcomes

1. Impact to existing channels

Officers have undertaken detailed analysis of the call types to four main service areas and the potential for savings in each. This is set out in Annex A, which provides a complete breakdown of calls to Customer Services in each area, and by type and complexity of call. Based on the analysis regarding existing contact channels by department, an enhanced digital provision in the form of a Customer Account in combination with chatbot technology should result in the following impact to the channels this business case has analysed:

80% reduction of calls made for Housing, Planning, Waste and Council Tax Enquiries where these calls are:

- o Status checks
- o Information requests
- o Contact regarding the provision of information

An increased capacity to deal with the calls currently being abandoned – which will also themselves be reduced by the 80% being applied to those calls that can be channel-shifted.

If this can be achieved, the table below provides an overview of the expected future volumes:

Channel	Department	Existing volumes	Future volumes
Telephony	Housing	30,743	19,068
	Planning	9,405	3,926
	Council Tax Enquiries	14,053	5,873
	Waste & Recycling	9,912	1,655
	Sub-total	**64,113**	**30,522**
General enquiries form	Housing	1000	584
	Planning	700	252
	Other services	5,000	2,200
	Sub-total	**6,700**	**3,036**
	Total	**70,813**	**33,558**

This would equate to a 30% reduction in total mainline call volumes.

The % reduction has been determined by the total impact the digital provision could have on these contact types (which is in fact closer to 100%), reduced by the level of digital enablement applicable to the district of Tandridge which is 80%.

Of the calls that cannot be deflected altogether to digital self-service (so the remaining 20%) there will undoubtedly be some efficiency gains as a result of a better level of integration between key line of business systems and the CRM. Critically the telephony channel will be freed up to be used by those who are not digitally enabled or need to make contact in an emergency or urgently.

By enabling direct customer interaction with the delivery of key services through a Customer Account mechanism, as well as further integration with line of business applications, those interactions deemed to be 'complex transactional' should also see either a reduction in volume or at least become more stream-lined due to automation and a reduction in needing to be double-handled.

Each 10% reduction in handling times in respect of these types of interactions could reduce costs as outlined below:

Channel	Department	Existing handling cost	Future handling cost
Telephony	Housing	£118,558	£106,703
	Planning	£12,775	£11,498
	Council Tax Enquiries	£20,215	£18,193
	Waste	£246	£221
	Total	**£151,794**	**£136,615**
			£15,179 total reduction

(This table refers only to a 10% reduction in complex transactional calls, not the total proposed saving).

As previously stated, 2 key contact channels are currently being used for significant volumes of contact with the Council which are essentially invisible or at the very least difficult to monitor: email and calls placed directly to Officers.

These will also undoubtedly be impacted by the ability to self-serve and transact digitally and are likely to be key areas of officer time saving for the Council.

2. Cost savings and break even

The cost savings that have been calculated for the purpose of this business case have focussed on those that could be taken from Telephony contact and the usage of the General Enquiries form in respect of Housing, Planning, Council Tax Enquiries and Waste. The table below includes a proposed saving of 80% in straightforward queries that we know can be digitised, plus a 10% reduction in the handling of complex transactional calls.

Channel	Service	Existing cost (£)	Future cost (£)	Saving (£)
Telephone	Housing	£181,039	£121,698	£59,341
	Planning	£24,495	£14,310	£10,184
	Waste	£28,791	£7,072	£21,719
	Council Tax Enquiries	£73,423	£30,963	£42,459
Telephony sub totals		**£307,747**	**£174,043**	**£133,703**
General enquires (returned contact)	Housing	£4,500	£900	£3,600
	Planning	£1,976	£395	£1,580
General enquiries sub totals				
Totals				**£138,883**

As mentioned, there are other key areas that need further analysis and will almost certainly present additional savings opportunities: direct officer calls, email contact, IVR lines answered by other services and the development of digital transactional capability.

The savings are predicated on the Council's customers engaging with us using new channels and the benefits realisation strategy will require formal planning and input from across the organisation and the Councillor community. The benefits realisation will be under-pinned and enabled by the Council's Customer Contact strategy mentioned previously.

Work will be required across the Council to translate these time savings into a reduction in officer requirement, to cover the annualised implementation cost.

The implementation timeline for the Customer Account is expected to be approximately 15 months, with the chatbot following 3 months later (so at 18 months). The ambition for channel shift should be to achieve the agreed objectives 2.5 years from commencement (so 1 year and 3 months from Go Live of the Customer Account).

If this is realised, the implementation will start to pay for itself from Q3 2025, so in year 3 of the 5 year timeline horizon.

	2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Account Implementation	▨	▨	▨	▨	▨							
Chatbot Implementation					▨	▨						
Channel shift						▨	▨	▨	▨	▨		
Break even										◆		

It is anticipated that the savings will continue to be delivered beyond the initial 5 years of implementation, since the Council would not revert to a more costly model of contact.

3. Channel shift objectives

The above contact reduction and cost savings will be achieved through channel shift to digital. In terms of anticipated annual usage therefore, this produces the following:

Source	Annual volumes
Contacted converted from Telephony (Mainline only) (80% of status checks, requests for info, provision of info)	35,000
Contact converted from General Enquiries (Planning & Housing only)	1,200
Contact converted from all other existing customer-facing online forms*	20,000
Placeholder for email contact conversion	
Placeholder for calls made directly to officers' conversion	

*All existing customer-facing online forms will be made available within the Customer Account, delivering as yet uncalculated benefits to all service requests and interactions currently handled through this channel.

Placeholders have been incorporated for the conversion objectives for emails and also direct calls to officers - these will need to be calculated within the scope of the Digital project.

4. Benefits Summary

- The chatbot is available 24/7 and can provide access to some of the services outside of usual office hours. It frees up the phone lines so that the team can deal with vulnerable customers, customers who are unable to contact us digitally, and those with complex queries.

- Customers who are digitally enabled will only need to call if necessary.

- Those who are not digitally enabled will be able to make contact more successfully.

- The customer contact 'experience' will be significantly improved.

- The Council will move from funding a failing telephony channel to investing in a fit for purpose channel which is scalable, can be developed as required and meets customer expectations.

- The Council will be able to track and monitor contact, enabling a better understanding of Customers' needs and where service improvements may be required.
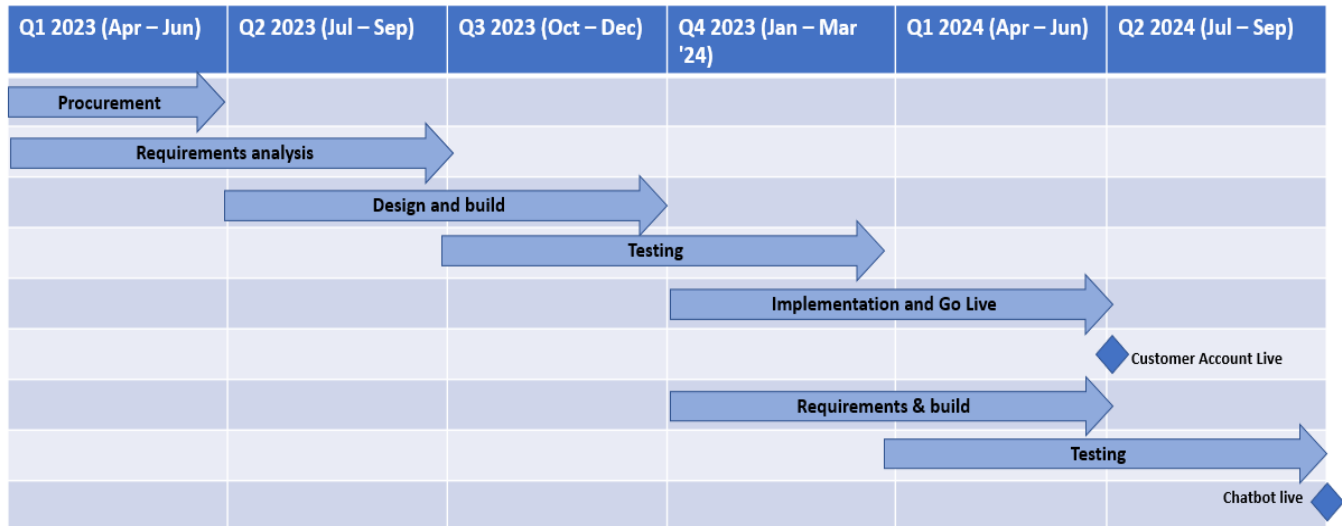
Conclusions

- That the Council should provide an enhanced digital offering to its customers.
- That this should comprise of:
    - A customer account which enables:
        - User-specific information to be obtained regarding services
        - Information to be supplied to the Council as needed and when requested
        - Status to be provided regarding in-flight transactions
        - Service requests to be made and managed
        - Contact to be made with Officers through a centralised channel
    - A chatbot which can:
        - Sign-post users to online resources
        - Promote the benefits of the account
        - Provide an access 'window' into the customer account
- That an integration platform is used to pull data from/push data to interfacing line of business applications
- That these digital services and technical developments are delivered by enhancing the existing software which is currently the Council's CRM, case management, Planning and Waste services platform.
- That the technical implementation delivers both the account and the chatbot in a combined initiative.
- That this is led by an experienced Digital Lead with a proven track record in:
    - Digital transformation implementation and benefits realisation
    - Customer Contact Strategy definition and implementation
    - The implementation of Salesforce technologies to deliver a Customer Account
- That the Council defines a benefits realisation plan.
- That the Council defines a Customer Contact Strategy to support benefits realisation.
- That the Council reviews contact being made through the mainline number with all services.
- That the Council reviews contact being made directly to officers via telephone and email to establish the cost of these channels and identify further savings.

Timeline Expectations

The timeline cannot be fully defined until the Digital Lead is in post and the project has mobilised. Additionally, some aspects of the timeline will be defined in conjunction with the implementation partner.

Initial discussions with other Councils and potential implementation partners have indicated that we can expect the timeline to look as follows:

Q1 2023 (Apr – Jun)	Q2 2023 (Jul – Sep)	Q3 2023 (Oct – Dec)	Q4 2023 (Jan – Mar '24)	Q1 2024 (Apr – Jun)	Q2 2024 (Jul – Sep)
Procurement →					
Requirements analysis →					
	Design and build →				
		Testing →			
			Implementation and Go Live →		
					◆ Customer Account Live
			Requirements & build →		
				Testing →	
					Chatbot live ◆

Risks

Each of these risks will be assigned an owner and managed through the FTP Risk Management Process.

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 the platform's implementation).	
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.
Increasing costs of goods and services globally could lead to the current quotes increasing if there are significant delays in the proceeding with this project.	A key objective for the digital lead will be to negotiate with suppliers and lock in the best possible pricing as soon as this business case is approved.
Role out of the enhanced digital offering is not effectively communicated to the residents and uptake falls short of expectation.	A comprehensive communication and customer engagement strategy will be designed and delivered to support the role out of the enhanced digital offering.

Dependencies

The key dependency for the digital tools' implementation is the Telephony replacement that the Council will be undertaking in parallel. The new contact centre software will support integration between the Account/chatbot and the Telephony solution and allow customers to 'convert' to a call when this is necessary.

The integration capability will also enable those customers who do need to call the Council to be automatically identified within the CRM so that call-handlers are presented with a screen pop displaying customer details, previous interactions, cases etc.

It is relevant to note that this same capability could also be used to identify those customers who are deemed to be vulnerable or who have complex needs. Furthermore, the Council could consider using this technology to route these customers to a dedicated Team within Customer Services who are specially qualified to handle these calls.

The Telephony dependency will be de-risked by the Digital Lead co-project managing that initiative with the Telephony replacement project manager – to ensure that both initiatives are well connected, and that the integration capability required by the Customer Account and chatbot will be in place when it is needed.

Annexes:

A: Customer call analysis by service

Housing

Volumes

A significant proportion of the calls received by the Customer Services Team (31%) are in respect of Housing.

The Council receives approximately 22,000 Housing calls to its mainline number per year. The total volume of calls received by the Council in respect of Housing (i.e. including those calls made to Housing Officers directly) is not currently possible to identify due to the telephony software's limitations, so the total volume of contact coming through this channel is likely to be much higher. Additionally, if calls filtered out to the Repairs line are included, the number increases to approximately 30,000 calls per year – about 30% of the total calls received into the Council's mainline.

Approximately 26% of these are abandoned after an average wait time of 5 minutes. Of the calls that make it through to the Contact Centre, approximately 50% are resolved by the Customer Services Team, with the other 50% needing to be passed on to the Housing Department. The table below shows how these are typically divided between the services:

	Calls made	Calls abandoned	Calls resolved by CS	Calls needing to be passed to the service
Housing Needs	7,535	1,555	1,518	4,462
Housing Rents	4,869	1,005	2,070	1,794
Tenancy Management	5,158	1,064	644	3,450
Housing Support Fund	1,855	383	828	644
Housing Repairs (Non-IVR)	1,159	239	0	920
Housing Repairs (IVR)	8,642	693	0	7,949
Totals	**29,218**	**4,939**	**5,060**	**19,219**

Purpose

Analysis undertaken on the reasons why telephone contact is made with the Council in respect of Housing has identified that people are calling for the following types of reasons:

Purpose	Volume	%
Information request	4,554	18.8%
Status check	1,978	8.2%
Provision of information/documentation	4,600	18.9%
Transactional	13,147	54.1%
Totals	**24,279**	**100%**

Costs

Statistics have been captured regarding the typical length of each of these types of calls including 'wrap-up' (time spent by Officers making notes against the contact/undertaking follow-up work). These have been annualised to produce a summary of how much time is currently being spent by Council officers handling Housing calls and what that costs the Council per year:

Service	Purpose	Calls resolved by CS	Calls passed to the service	Total Cost
Housing Needs	Information request	£697	£17,244	£17,941
	Status check	£532	£5,429	£5,961
	Provision of information/documentation	£222	£4,137	£4,359
	Transactional	£807	£16,299	£17,106
Housing Rents	Information request	£734	£3,370	£4,104
	Status check	£334	£1,641	£1,975
	Provision of information/documentation	£1,250	£6,060	£7,310
	Transactional	£291	£2,279	£2,570
Tenancy Management	Information request	£261	£10,066	£10,327
	Status check	£22	£1,350	£1,372
	Provision of information/documentation	£229	£4,681	£4,910
	Transactional	£340	£18,418	£18,759
Housing Support Fund	Information request	£0	£0	£0
	Status check	£0	£0	£0
	Provision of information/documentation	£1,098	£2,620	£3,718
	Transactional	£0	£0	£0
Housing Repairs	Information request	£0	£1,410	£1,410
	Status check	£0	£485	£485
	Provision of information/documentation	£0	£0	£0
	Transactional	£0	£78,926	£78,926
Totals for Housing	**Information request**	**£1,692**	**£32,090**	**£33,782**
	Status check	**£888**	**£8,905**	**£9,793**
	Provision of information/documentation	**£2,799**	**£17,498**	**£20,297**
	Transactional	**£1,438**	**£115,922**	**£117,361**
	Overall Totals	**£6,817**	**£174,415**	**£181,233**

When averaged out over the total volume of Housing calls dealt with by the Council (i.e. excluding abandoned calls), this produces an average per call cost of £7.46 and a total cost of £181,233.

Of the 8,000 or so calls needing to be passed on to the service, approximately 2,000 (25%) are unsuccessful and result in Customer Services having to re-collect the call and record a call-back. This creates a case in Salesforce for the Housing Officer providing them with the call details to request

the customer is contacted. This activity takes on average 3 minutes and using the average hourly cost of a Customer Services agent produces an annual cost of £1,800. This work is undertaken by Customer Services at the expense of being able to pick-up another call. Additionally, when these added to the volume of calls abandoned annually, the 'failed' call % is increased to 35% of all service calls.

Planning

Volumes

The Council receives approximately 9,500 calls to its mainline number per year in respect of Planning[1]. Approximately 26% of these are abandoned after an average wait time of 5 minutes. Of the calls that make it through to the Contact Centre, approximately 27% are resolved by the Customer Services Team, with the other 73% needing to be passed on to the Planning Department. The table below provides typical annual statistics:

	Calls made	Calls abandoned	Calls resolved by CS	Calls passed to the service
Planning	9,405	2,456	1,876	5,073

Purpose

Analysis undertaken on the reasons why telephone contact is made with the Council in respect of Planning has identified that people are calling for the following reasons:

Purpose	Volume	%
Information request	1,726	24.8%
Status check	1,725	24.8%
Provision of information/documentation	1,150	16.6%
Transactional	2,348	33.8%
Totals	**6,949**	**100%**

Costs

Statistics have been captured regarding the typical length of each of these types of calls including 'wrap-up' (time spent by Officers making notes against the contact/undertaking follow-up work). These have been annualised to produce a summary of how much time is currently being spent by officers handling Planning calls and what that costs the Council per year:

Service	Purpose	Call resolved by CS	Call passed to the service	Total cost
Planning	Information request	£804	£2,303	£3,107
	Status check	£245	£5,866	£6,111
	Provision of information/documentation	£1,093	£1,409	£2,502
	Transactional	£651	£12,124	£12,775
	Totals	**£2,793**	**£21,702**	**£24,495**

When averaged out over the total volume of Planning calls dealt with by the Council (i.e. excluding abandoned calls), this produces an average per call cost of £3.53 and a total call cost of £24,495.

Of the 5,073 or so calls needing to be passed on to the service, approximately 650 (13%) are unsuccessful and result in Customer Services having to re-collect the call and record a call-back. As with Housing, this takes on average 3 minutes and using the average hourly cost of a Customer Services agent produces an annual cost of £540. Again, this work is undertaken by Customer Services

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[1]Per Housing, it is currently not possible to capture statistics regarding calls being made to Planning officers directly, so in reality the volume of telephone contact for Planning will be much higher.

at the expense of being able to pick-up another call and when added to the volume of calls abandoned annually, pushes the 'failed' call % up to 33% of all service calls.

Waste & Recycling

Volumes

The Council receives approximately 9,912 calls to its mainline number per year in respect of Waste and Recycling. Approximately 27% of these are abandoned after an average wait time of 5 minutes 50 seconds. Of the calls that make it through to the Contact Centre, approximately 55% are resolved by the Customer Services Team, with the other 45% needing to be passed on to the Waste & Recycling Teams. The table below provides typical annual statistics:

	Calls made	Calls abandoned	Calls resolved by CS	Calls passed to the service
Waste & Recycling	9,912	2,697	3,968	3,247

Purpose

Analysis undertaken on the reasons why telephone contact is made with the Council in respect of Waste & Recycling has identified that people are calling for the following reasons:

Purpose	Volume	%
Information request	1,858	25.8%
Status check	2,808	38.9%
Provision of information/documentation	2,419	33.5%
Transactional	130	1.8%
Totals	**7,215**	**100%**

Costs

Statistics have been captured regarding the typical length of each of these types of calls including 'wrap-up' (time spent by Officers making notes against the contact/undertaking follow-up work). These have been annualised to produce a summary of how much time is currently being spent by Council officers handling Waste & Recycling calls:

Service	Purpose	Call resolved by CS	Call passed to the service	Total cost
Waste & Recycling	Information request	£2,061	£2,810	£4,871
	Status check	£2,503	£9,469	£11,972
	Provision of information/documentation	£1,955	£9,748	£11,703
	Transactional	£0	£246	£246
	Totals	**£6,519**	**£22,273**	**£28,792**

When averaged out over the total volume of calls dealt with by the Council (i.e. excluding abandoned calls), this produces an average per call cost of £3.99 and a total call cost of £28,792.

Council Tax Enquiries

Volumes

The Council receives approximately 14,053 Council Tax Enquiry calls to its mainline number per year. Approximately 9.51% of these are abandoned. Of the calls that make it through to the Contact Centre, approximately 32% are resolved by the Customer Services Team, with the other 68% needing to be passed on to the Revenues Service. The table below provides typical annual statistics:

	Calls made	Calls abandoned	Calls resolved by CS	Calls passed to the service
Council Tax Enquiries	14,053	1,350	4,065	8,638

Purpose

For Revenues & Benefits, whilst the Council has a customer portal that provides a comprehensive offer in terms of transactional capability, it offers no contact capability or ability to check the status of an application or in-flight process. Analysis undertaken on the reasons why telephone contact is made has identified that people are calling for the following reasons:

Purpose	Volume	%
Information request	3,779	29.7%
Status check	1,112	8.8%
Provision of information/documentation	4,763	37.5%
Transactional	3,049	24.0%
Totals	**12,703**	**100%**

Costs

Statistics have been captured regarding the typical length of each of these types of calls including 'wrap-up' (time spent by Officers making notes against the contact/undertaking follow-up work). These have been annualised to produce a summary of how much time is currently being spent by Council officers handling Council Tax Enquiry calls:

Service	Purpose	Call resolved by CS	Call passed to the service	Total cost
Council Tax Enquiries	Information request	£810	£27,037	£27,847
	Status check	£593	£4,295	£4,888
	Provision of information/documentation	£3,814	£16,672	£20,486
	Transactional	£0	£20,205	£20,205
	Totals	**£5,217**	**£68,209**	**£73,426**

When averaged out over the total volume of calls dealt with (i.e. excluding abandoned calls), this produces an average per call cost of £5.78 and a total call cost of £73,426 for Council Tax Enquiry calls.

B: Website statistics

The table below shows viewing volumes by page:

TDC Webpage Groups		Number of webpages viewed	%
Overall Total webpages Viewed		**2,643,826**	
Main TDC Webpage		237,262	9.0%
Contact Us Webpages		**32,256**	**1.2%**
Your Council & News Webpages		**25,948**	**1.0%**
Payment Webpages		**24,709**	**0.9%**
My House Webpage		16,793	0.6%
Form Submitted - Thanks Webpages	**16,254**		**0.6%**
Sign Up For Email Updates Webpages		**12,538**	**0.5%**
Report It Webpages	**8,227**		**0.3%**
Cost of Living Support Webpages	**6,683**		**0.3%**
Job Vacancies Webpages		**6,455**	**0.2%**
Apply For 'xxx' Webpages		**4,192**	**0.2%**
Ukraine Webpages		**3,488**	**0.1%**
Housing Services Webpages	**41,700**		**1.6%**
Housing Home webpage	10,824		0.4%
Apply for Council Housing Webpage	8,771		0.3%
Planning Services Webpages		**1,278,471**	**48.4%**
Planning Search Webpage		849,677	32.1%
Planning Application Detail Webpage		136,526	5.2%
Waste & Recycling Services Webpages		**247,533**	**9.4%**
Recycling & Rubbish Webpage	72,832		2.8%
Council Tax Services Webpages		**104,982**	**4.0%**
Manage your Council Tax online Webpage	11,056		0.4%
Benefits Services Webpages		**34,625**	**1.3%**
Manage your Benefits online Webpage	361		0.01%
Business & Licensing Webpages		**7,789**	**0.3%**
Democratic Services Webpages		**39,717**	**1.5%**
Councillors & Committees Webpage	11,362		0.4%
Parking Webpages		**23,224**	**0.9%**
Parks Webpages		**16,319**	**0.6%**
Environmental Webpages		**6,972**	**0.3%**
Environmental Concerns Webpage	2,734		0.1%
Noise complaints Webpage	1,929		0.1%

C: walk-in statistics

Front Counter - Service Area / Activity	TOTALS	%	Monthly Average
Council Tax	151	19.0%	19
Benefits	111	14.0%	14
Planning	68	8.6%	9
Housing Needs	60	7.6%	8
Tenants	52	6.6%	7
Housing LL	54	6.8%	7
Waste	38	4.8%	5
Rent	35	4.4%	4
Env Health	20	2.5%	3
Elections	20	2.5%	3
Blue Badge	17	2.1%	2
Delivery	16	2.0%	2
Certificate of Life	14	1.8%	2
Repairs	13	1.6%	2
Interviews	13	1.6%	2
HR	9	1.1%	1
Payment	6	0.8%	1
Legal	3	0.4%	0
Asset Management	2	0.3%	0
Facilities	2	0.3%	0
BID	1	0.1%	0
Finance	1	0.1%	0
Other	87	11.0%	11
Total	**793**	**100.0%**	**99**