THE ROYAL BOROUGH OF WINDSOR & MAIDENHEAD CREATE A TOUCHLESS DIGITAL COUNCIL

A Case Study
A BETTER PATH TO DIGITAL CUSTOMER SERVICE

Home to over 140,000 residents, the Royal Borough of Windsor & Maidenhead is committed to a digital transformation of services for their residents and visitors.

Adopting a ‘transparency’ manifesto whereby users can track progress of their interactions with the council 24/7, the Royal Borough of Windsor & Maidenhead partnered with Jadu to take the next step in their digital journey.

This led to the removal of disjointed, siloed systems and the implementation of a streamlined, ‘real-time’ digital customer services platform.
THE BUSINESS CASE

One of the main objectives is for the council to make 40% in savings across all services over the next three years.

The Royal Borough of Windsor & Maidenhead has committed to limit council tax rises at or below the rate of inflation, whilst further improving services, so savings need to be made through efficiency whilst preserving the commitment to be ‘Digital by Choice’.

Therefore, the way customers are served needs to be remodelled around efficient self-service that allows the customer to make choices, on any device, with ‘digital’ being the preferred channel.

Systems being rationalised initially in this project will lead to over £80,000 of savings in costs per annum, including the replacement of Lagan (CRM), Firmstep (forms) and Salesforce (Customer Services) in the first few phases of the programme.

Another key objective is to raise the performance of the council, both internally and externally. The organisation has taken a complete shift in its approach, investing in Agile methodology and training 120 managers and team leaders in one month to deliver a new, digital council.

This transformation, led by Simon Fletcher, Strategic Director of Operations and Customer Services, required a solution for the customer services team that could deliver against residents and visitors needs. Historically, 82% of resident contact came via telephone to the customer contact centre with only 10% of contact being made online.

The target here is to reduce the inbound telephone contact and increase online interactions by 60%. There will be a total of 14 services delivered in an eight month period, with ‘green waste’ being the first digital service available for residents to use.
TAKING THE PAIN OUT OF PROCUREMENT

The council has a clear mandate to deliver value for customers through digital transformation.

The emphasis is now on implementing a new digital customer service strategy within a timeframe that enables savings to be made on existing systems that are no longer fit for purpose. Having used the G-Cloud framework once before, the council conducted a market test and selected Jadu Customer Experience Management (CXM) and Jadu XForms Professional (XFP) from G-Cloud.

The selection was made in January 2016, with implementation beginning by March 2016. This was made possible by the rapid and efficient G-Cloud procurement process, which also enabled the council to 'start small' and iterate the roll-out of digital services, learning with each service that is rolled out.

WHY GREEN WASTE AS THE FIRST EXEMPLAR?

The council offers its residents an annual subscription service, where orders for a green waste bin or multiple bins can be made either online, on the phone or by coming into the council offices.

This process has historically been managed by at least two full time staff within customer services, using an internal spreadsheet to manually record and manage subscription information and renewals.

‘Green waste' was selected as the first service because it was a complex workflow (renewals and collections and cancellations that needed to be automated), involved a third party contractor (Veolia) and was also linked to payments and cash receipting therefore, requiring integration.
BEGINNING WITH A SIMPLE SOLUTION TO A COMPLEX PROBLEM

The implementation started by developing an intelligent eForm using Jadu XFP and integrating this form with the council’s Adelante payments processing system.

The intelligent form knows when a resident requires a new bin, wishes to renew an existing bin or offers the ability to add an additional bin.

Once submitted, the form raises a case inside the Jadu CXM platform where the resident can manage their subscription and discuss it through the council customer services team.

The resident can also manage their subscription from the ‘MyAccount’ page within the council’s website and track progress on enquiries as well as receiving notification by email and in later phases, SMS messaging.
CRM LITE

The council currently uses a legacy CRM system that manages 10% of service requests, a forms product that generates emails as well as Salesforce.com within customer services.

Like many other councils, the Royal Borough of Windsor & Maidenhead have historically faced several challenges and encountered lengthy decision-making processes over what direction to take with a CRM strategy going forward. Having tried several solutions including a number of traditional cloud CRMs and self-service products, the council decided to take very different approach to what had been done previously.

This time, they asked residents what they needed from council services and as a result of the feedback received, they opted for a ‘lite’ approach to CRM - one that had minimal to zero infrastructure that was licensed based; something that worked for all council employees.

After extensively researching the market for a cloud based case management solution that allowed real-time updates, transparency, collaboration and instant chat for staff and residents online, the council selected Jadu CXM.

Purchased through G-Cloud, Jadu CXM provides one centralised work queue for all teams to access and manage queries with an update on the status of the case. Changes in the status trigger an email notification for the customer so they are continuously kept up to date delivering an ‘Amazon-like experience’. Now, customer contact is seven days a week via a digital platform and will continue to be this way.
Jadu’s eForms package (Continuum XFP) has also been implemented as a solution to the council’s challenge to reduce paper forms requiring heavy amounts of manual data input.

The eForms solution also includes online payments, which is now integrated with the council’s Adelante payment processing solution. Forms are now easily created by business analysts and other non-technical council employees, saving time and significant costs.

The real benefit is that now, customers can have two-way, open communication with the council and be equally involved as they can upload documents or add comments to their case, in real time.

Most importantly, this can be done on any device (mobile or desktop). Research conducted and interpreted by Spacecraft Digital along with website analytics showed that a high volume of traffic to the council website comes from mobile devices and tablets.

“We’re very pleased with the new Jadu digital channel. The benefit is that a resident can sit at home, on a train, on a mobile at work and use council services at their leisure at a time that suits them, rather than having to come into the town hall or having to phone or write to us. It’s a far more efficient way of ordering the council’s services and for us to deliver them.”

Councillor Geoff Hill,
Cabinet Member Highways, Transport, Customer & Business Services, IT
Rather than implementing an expensive solution to deliver the personalisation and account features, the Royal Borough of Windsor & Maidenhead used the standard out of the box features of the Jadu platform and delivered what was required to meet customer needs they had previously identified.

With this now in place, customers can:

- Apply and pay for services
- Track their service requests in real-time
- Retrieve saved forms
- View all historic requests

The council leveraged a standard feature of the Jadu XFP solution that delivers a personalised 'MyAccount' page for customers who wish to register and track services.
Specific widgets can be developed for line of business applications, such as Veolia’s ‘Echo’ system, meaning the MyAccount functionality can be grown over time as customer feedback is gathered and changes need to be made.

There is also complete transparency through ‘MyAccount’ for cases created in Jadu CXM where they can see updates to their cases by their case handler or agent. Customers can login and track the progress of cases as well as receive ongoing updates on the status of their cases.

Further phases will see notifications on customer cases being made by back office systems such as Confirm (street care), Outlook 365 calendars, IDOX Uniform (environmental services) and potentially a new telephony system currently being implemented as well as Capita Academy, the core back office system that managed Revenues and Benefits.

The Royal Borough of Windsor & Maidenhead is very keen to avoid building a ‘silied’ customer experience, where customers would need to log-in to different environments and portals just to get access to basic information or submit cases and service requests. Rather, the council strives for a ‘single’ experience for customers that delivers the right services and content to fit the customer’s needs.
Figure 1.0: The silo of existing MyAccount tools and portals from many line of business software providers meant customers had a broken, frustrating experience when trying to seamlessly access council services.

Figure 1.1: Digital Customer Service Platform
Jadu CMS and eForms solutions are already corporately rolled out and directly surfaced to the customer as a 24/7 service. The customer experience is 'unlocked' by replacing the 'back office' CRM model for a 'front office' model, where the customer is able to track and view their cases and service requests in 'MyAccount' as they move through the council’s processes. Customers are continuously updated on case progress by email and potentially SMS messages.
RE-DESIGNING SERVICES TO BE DIGITAL

The Royal Borough of Windsor & Maidenhead took a proactive approach to re-shape the way services operated.

They invested in staff and supported them in the analysis of current process, finding areas that can be streamlined or waste that could be eliminated using lean practices.

“Staff themselves have got to be able to maintain it, develop it and change it. Jadu CXM platform allows us to do exactly that.”

Jacqui Hurd,
Head of Customer Services.
Re-designing services to be digital

Jadu and the Royal Borough of Windsor & Maidenhead based the project loosely on the Local Government Service Standards, which amongst other things suggests that the council “Test the service from beginning to end with appropriate council member or senior manager responsible for it”.

Very early in the project, the council wanted to make sure that members were closely involved in the evolving solution. As part of the delivery process, Jadu filmed ‘sprint’ videos which were recorded by the project teams and shared with all senior stakeholders, including members.

The team also started a blog, to ensure that learning and discovery as well as outcomes were shared with the community inside Local Government. This transparent approach meant that everyone with an interest in the transformation to digital was kept informed and enthusiastic!

One of the first services (green waste subscriptions) delivered to ‘beta’ was tested by Councillor Geoff Hill, lead member for IT and Customer Services, becoming one of the first ‘real’ customers to subscribe to receive a green waste bin.
INTEGRATION STRATEGY

The Royal Borough of Windsor & Maidenhead initially created a ‘long list’ of all the line of business systems they felt needed to be integrated to the new digital customer platform.

The list of over 20 systems ranged from revenues and benefits systems to environmental services. Once the first phase was underway and nearing completion, the council reviewed the list and based on knowledge of the new digital platform, arrived at a much shorter list of around 5 core systems. These included:

- Adelante - for online payments processing (now completed)
- Confirm - for environmental services (next in line for delivery)
- Uniform - for tree preservation and a suite of other services
- Capita Academy - for revenues and benefits
- Telephony - a system as yet to be procured and implemented

The integration approach is now more focused and business cased based on the needs of the customers as well as the efficiencies and cost savings the integration will deliver.

CONTINUOUS, AGILE ROLL OUT

The Royal Borough of Windsor & Maidenhead are using the ‘iterative’ roll out process developed by Jadu to help organisations phase out legacy CRM products and continuously increase the coverage of the CXM platform across all services.

By creating a road-map of services to ‘offboard’ from their legacy CRM products, they are able to prioritise their effort and time to deliver the right services in the right order.

This also enabled the council to continually iterate on their own needs - inspecting and then adapting to needs of customers and customer services staff as their needs changed.
WHAT’S NEXT?

The council have now started launching new services that have been built internally by staff, including ‘missed bins’ and ‘complaints’.

The roll out plan is based on deploying 14 services within four months and then begin to include internal services, such as case management for councillors, facilities help desk management and HR (case management for internal employees and HR processes).

“What I particularly like about our relationship with Jadu is the ‘we’re in it together element’, but also that they are training us to use the system as they would themselves... So in the future, we can reduce our investment in Jadu professional services and yet still continue to develop digital services for our residents.”

Simon Fletcher,  
Strategic Director of Operations and Customer Services

Find out more about Jadu CXM at jadu.net/cxm

Follow their digital journey on the Royal Borough of Windsor & Maidenhead blog at jadu.net/blog/rbwm-digital