

PROJECT INITIATION DOCUMENT (PID)

Project Name:	Customer Contact Strategic Review		
Project Sponsor:	Steve Hampson – Executive Director (Operational Services)		
Project Manager:	Paul Knight – Senior Policy & Performance Officer		
Date Issued:	06 October 2010	Version No:	3

Background:

The Contact Centre Performance Review 2002/03 – 2009/10 has highlighted a shift in the way customers contact the council. Over the previous 5-year period telephone contact has significantly decreased at both the Council offices and contact centre. During the same period customers accessing Council services via the web has significantly increased.

Whilst the performance review was being completed the Council announced its key actions for 2011/12, including a review of customer contact and a commitment to make the website more transactional. This announcement, coupled with the results of the performance review, has led to the decision to expand the project to cover a holistic review of customer contact.

Customer access channels include:

Contact Centre - service provision includes:

- Housing Options and Allocations
- Housing Services & Housing Repairs
- Benefits and Fraud
- Switchboard
- Electoral Registration
- Environmental Services & Environmental Protection
- Food / Health and Safety
- Health Protection
- Home Improvement Agency
- Licensing
- Development Control
- Conservation
- Building Control
- Planning Enforcement / High Hedges / Tress & Landscaping

Electronic –

- Website, all services (various degrees of functionality)
- Email / Fax

Direct Dial –

- Limited direct dials publicised

Face to Face –

- Reception Service
- Community Events / Clinics / Members

In writing –

- Letter

Project Objectives:

The strategic review seeks to identify for SMT and subsequently Member approval, by June 2011, the option or options for providing an integrated, holistic customer contact framework / system which will best serve the Council and community, having regard to an appropriate mix of customer service and value for money.

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IN SCOPE	OUT OF SCOPE
<p>The review will (1) involve the early identification and subsequent thorough analysis of the options for the most efficient and effective means of delivering an integrated customer contact framework, (2) explore services which may be provided better in other ways and those which it may be appropriate to include within any future contract specification if necessary, (3) give due consideration to the contact centre contract and future provision post the expiry in Dec 2012, (4) review all other customer access channels.</p>	<p>(1) Operational performance monitoring and service levels, which will continue to be overseen by the Customer Service Coordinator and current monitoring framework; however, the impact of current performance on longer-term performance trends will be a relevant factor in analysing the customer service and value-for-money provided by the existing contractor.</p> <p>(2) A full procurement exercise which, if appropriate, will follow the conclusion of this review. This does not exclude discussions and soft market testing with other service providers in the public and private sectors as part of the review and comparison process.</p>
<p>Products / Outcomes:</p>	
<p>As identified above, the desired outcome is for a robust option or set of options for the future provision of relevant operational services to be recommended to SMT and Members by June 2011. As each key option is analysed, there may be innovate ways of working arising which may affect the operation of current customer service arrangements in positive ways and can be implemented within its terms.</p>	
<p>Assumptions and Constraints:</p>	
<p>A central assumption is that SCDC retains a desire to provide a 'one-stop shop' approach to customer service based on a contact centre model, and that there are a number of operational services for which such a model is desirable (potentially over and above the current extent of services covered).</p> <p>It is assumed that the key future options for service provision are (subject to compliance with relevant contract and procurement regulations and guidance) as follows:</p> <ul style="list-style-type: none"> i. Maintain a contractual relationship with Cambridgeshire Direct, but with significant variations in terms of scope and service levels, whilst continuing to promote the use of the web and reception service. ii. Explore alternative options for outsourcing services, whether to public or private providers, or a combination of the two. iii. Bring the service in-house, either wholly or in part (managed by SCDC alone, or in partnership with local and regional public and private partners). <p>It is accepted that this list is not exhaustive, and it is possible that other options may arise during the course of the review. All options will be thoroughly analysed.</p> <p>It is assumed that, as a consequence of specific initiatives such as the planning duty officer system, the potential outsourcing of the housing repairs contract and increased use of electronic means of access, that telephone call volumes will continue to decline.</p> <p>The Council's Medium Term Financial Strategy and national public sector deficit set out a financial context in which the Council is likely to have to shape all its services within an environment of severe and increasing financial constraints.</p>	

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Risks:

- i. The anticipated requirement, in analysing the options, to work with service representatives who have competing operational and improvement priorities, in an environment of diminishing resources.
- ii. The danger of the project work and outcomes compromising any subsequent procurement processes, leading to potential delay and financial penalties for the Council.
- iii. Emerging policy by the new government, which may require adaptation of the project to reflect new thinking and legislation in respect of customer service.
- iv. The requirement to complement the Customer Services Excellence project, which aims to ensure that accreditation is secured and maintained.
- v. Risk to the morale of front line staff in the knowledge of a review, which may lead to a different means of service provision and potential redeployment and redundancy.
- vi. Further resources restraints falling on the Council as part of government efforts to reduce the public sector deficit e.g. Council Tax freeze, reductions in central grant, make continuation of service provision at current levels unviable and key options impossible to implement.

Project Quality Plan:

The project will be deemed a success if SMT and Members feel they have the necessary information to make an informed decision about the future of the customer contact within the project timescale, and that they subsequently take this decision. Progress against this objective will be monitored through timely communication with SMT and the Portfolio Holder.

In the longer-term, the success of the project can only be measured once revised arrangements are put in place, which lead to immediate and sustained improvements in customer service and value for money.

Project Organisation Structure:

The project will be led and managed within the Policy and Performance Team by the Senior Policy and Performance Officer. In the interests of enhanced the role of existing groups, it is proposed that the South Cambs reps on the Partnership Board fulfil the project assurance role, receiving appropriate update, highlight, change and risk reports based on the corporate project management methodology. It is proposed that the Board schedule four additional meetings, over and above its current quarterly programme, to accomplish this. Where necessary, a system of split agendas can be operated, so as to include partner representatives in discussions of operational performance issues.

The Policy and Performance Portfolio Holder to be invited to attend assurance group meetings.

Communications Plan:

For list of key stakeholders please see **Appendix A** below.

Communicate project objectives and outcomes effectively through project update reports, CEX weekly message, corporate brief etc.

Project Controls:

As per project organisation structure (see above).

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Timescale:	
Baseline Start Date: 01 July 2010	Baseline Finish Date: 31 March 2011
Detailed project and milestone plans to be added.	
Resources: To be undertaken entirely from within existing resources.	
Budget:	Total Staff Work Days:
Based on 20% of the Senior Policy and Performance Officer's time: 39 days	
Contributions by other key staff e.g. corporate managers, head of ICT, service managers in terms of contributions to the review, consultation responses and specific support and advice e.g. procurement, HR, legal. Estimate: 25 days.	

Authorised By:	<i>Signature</i>	<i>Date</i>
Project Manager:		
Project Sponsor:		

Produced By:	Richard May	02 June 2010
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Appendix A - Contact Centre Strategic Review - List of Key Stakeholders

Group	Key Characteristics	Hard to reach or Disadvantaged?
SMT and Cabinet	Political and managerial high-level control and direction for the review.	No
Scrutiny and Overview Committee; other nonexecutive Members	In terms of constructive challenge, contribution to policy development, responsibility for overseeing the budget and policy framework, external customers of Cambridgeshire Direct and community advocates	Levels of engagement are likely to vary
Customers	As users of the current service; feedback will be crucial (incorporates residents, businesses and partners in the public, private and voluntary sectors)	Levels of engagement are likely to vary
EMT and Service Managers	Direct input in terms of evidence-gathering and other advice during the course of the review.	No
Contact Centre Management and Operational Staff	As providers of the current service and potential consultees in terms of the exploration of future service options.	Off-site, so potentially hard to reach and may suffer loss of morale e.g. through rumours of significant change or redundancy.
SCDC Staff (1)	As internal customers of Cambridgeshire Direct and consultees as part of the review	Levels of engagement are likely to vary depending on the nature and effectiveness of the current relationship
SCDC staff (2)	Likely to be directly affected by the long-term outcomes of the review, particularly front line staff, therefore should be kept apprised of its progress and consulted appropriately.	