

Transformation Programme Assessment & Closedown Report

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1. Background

In 2015, along with many other councils, it was recognised that South Somerset District Council (SSDC) faced challenges across several fronts. Whilst the most significant challenge was financial, they also recognised that they had other challenges in breaking down silos and traditional ways of working, as well as meeting the needs of a new generation of customers.

SSDC were forecasting the need to make over £4.1million of savings from the then current budget by 2020-21 and that financial pressures would increase over time. There was a recognition that the financial challenge could not be met without reducing staff numbers as 46%, or £32.3 million of SSDC's gross annual expenditure, was staff related cost. At that stage, the council had achieved workforce savings through sharing services and individual service reviews, but a more extensive programme of change was required. However, whilst recognising that costs including staff costs would need to reduce, the Council was keen not to see a corresponding reduction in service levels or outputs. It was therefore recognised that a different and more efficient approach to delivering services would be needed that required less staff and enabled the council to operate within the financial constraints imposed. Hence the transformation programme was created, and the background is covered next.

In November 2015, Ignite Consultants and Civica completed an initial business case for transformation of the Council, using the 'Future Model' concept, which was presented to members for approval in February 2016. The 'Future Model' concept is a framework for operating model design in local authorities and this was developed into a customer centric future operating model for South Somerset at the blueprint stage:

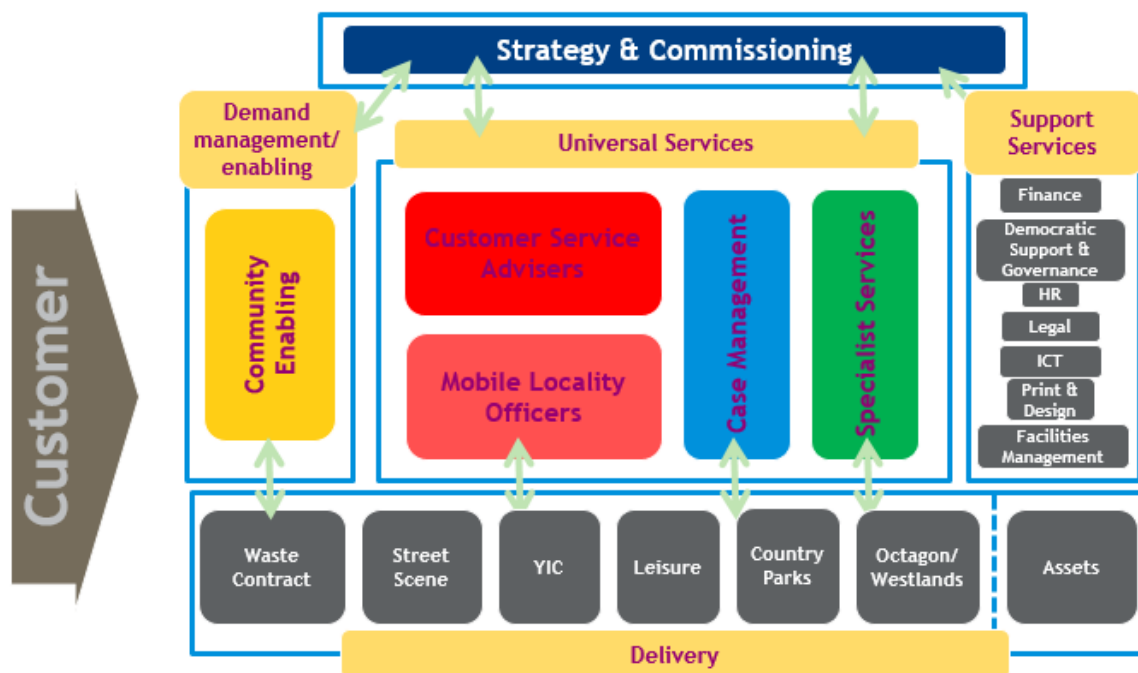


Figure 1: Future Model framework used to inform SSDC design

The blueprint assessed 'as is' activities across the organisation and aligned them to these operating model components. A maturity analysis projected benefit against four benefit drivers:

- Customer enabling
- Customer self-serve

- Internal remodelling
- Technology and process improvement

The development of a further blueprint and updated business case for the council was presented to and approved by members in April 2017. The implementation of the programme then started following this approval, including the development of a detailed operating model design. The implementation of the Transformation was led and managed by staff of SSDC working to a Programme Board of the Leader, Portfolio Holder and Senior Leadership Team. Implementation was supported by Ignite Consulting, Civica, Rebecca Bevins and South Hams & West Devon District Councils.

The Transformation of the organisation and the way it works to a fundamentally different operating model is a challenging undertaking. Even with the best planned programmes it can be expected that issues will arise in a programme of this scale, as the organisation seeks to change its operating model, processes, technology, culture and the way it interacts with service users. There are multiple related tasks and projects to be undertaken to deliver the desired outcomes and a considerable amount of learning that is required, at pace, across all services and staff.

Three years on, much has happened for the organisation including managing the impacts of the pandemic. It is now important to reflect on the journey the organisation has been on and this transformation assessment achieves this, as well as understanding what is next in the overarching goal of continuing to offer excellent services to its residents.

2. The engagement

SSDC have now moved beyond the original scope of the transformation programme and are keen to bring it to a close, and review the experience and lessons learnt from delivering the programme. Given the changing nature of the local government environment, learning and growing from these lessons will set them up for the broader conversations about the role of the council going forwards.

This assessment is intended to act as a checkpoint for the organisation with an acknowledgement of the significant changes on the horizon for the future of local government in Somerset. The challenge for SSDC is to ensure the organisation is ready for change and able to maximise the opportunities this will present.

The assessment focused primarily on looking back on what was intended to be achieved from the transformation programme, which consisted of two main benefit groups. These are

- financial savings benefit the organisation would achieve through the reduction in FTE and
- the benefit of unlocking efficiency/smarter ways of working across four key drivers.

Our assessment findings cover both benefit groups, what was intended to be achieved and our assessment of what was achieved from the transformation programme. The assessment also took a deeper dive into one of the key benefit drivers (technology) and also a closer look at how two teams have progressed through the journey, specifically Planning and Customer Connect.

A secondary request (from the Senior Leadership Team) of the assessment was to lay the foundation for the organisation moving forward following the transformation programme close. This involved taking the learnings from the programme and the assessment of where the organisation is at currently and understanding what further operational improvements can continue to be made to improve the service that the Council provides to residents.

The following delivery plan summarises the activities undertaken through the engagement to complete the assessment:

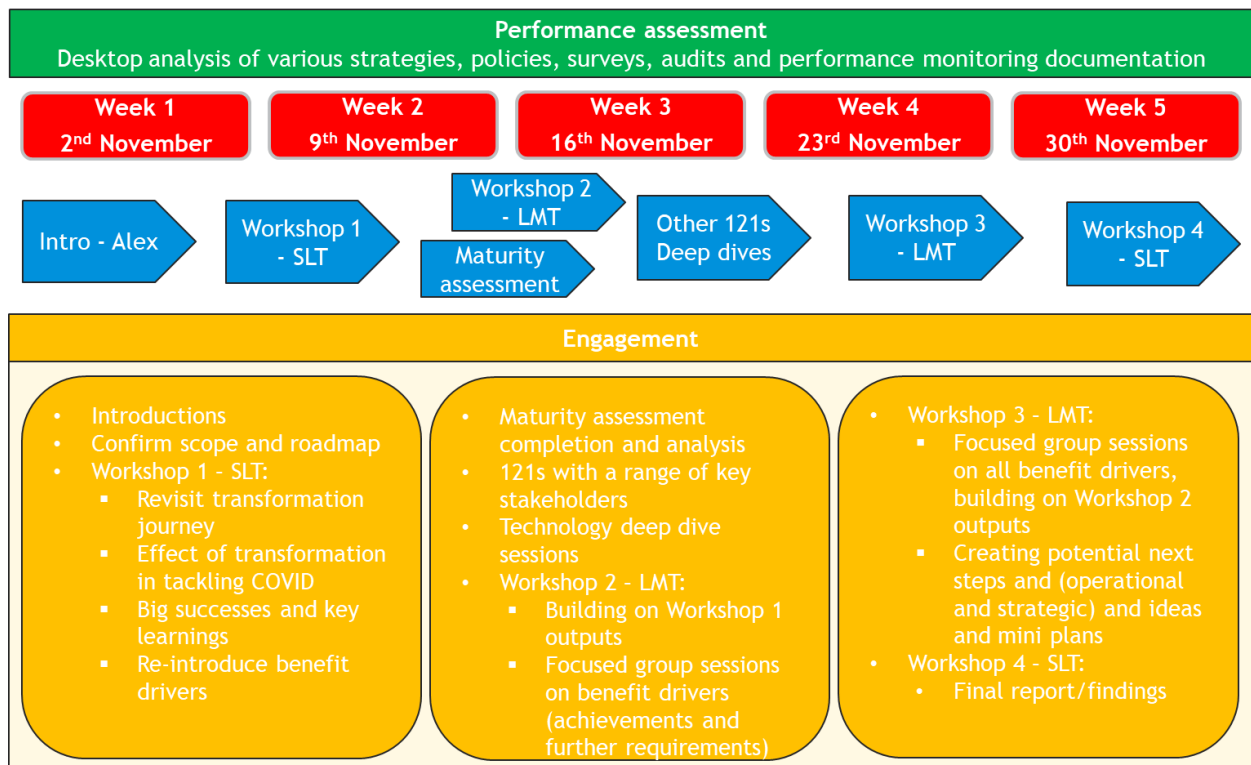


Figure 2: Roadmap of engagement activity

The following activities were completed to produce our assessment findings:

- Performance assessment: reviewing and analysing reports, and assessing consistency with the emerging narrative from engagements:
 - South West Audit Partnership (SWAP) audit report (parts one & two) and supporting calculations/documentation
 - Corporate report
 - Staff engagement survey
 - Customer access strategy
 - Performance reports
 - Revised transformation business case and supporting data (to inform staff capacity assessment)
 - Transformation programme report to Council, April 2017
 - Transformation programme progress update reports
- Engagement: a range of workshops, focused sessions, and stakeholder engagement to gain further insight into the transformation journey:
 - Completion of the 2020 maturity assessment and assessment of progress against the revised business case (completed by Leadership Management Team (LMT))
 - Deep dive sessions
 - Two deep dive workshops with representatives from the Planning Team and the Customer Connect Team
 - These involved the discussion of positives, challenges and what is currently being done to address these challenges, for both team's operations
 - Three areas of focus being people, processes, and technology

- One to ones and focused sessions with stakeholders
 - Ongoing stakeholder engagement with sponsors of the engagement
 - Session to review SWAP internal benefits realisation audit (parts one & two)
 - Three sessions with a total of five Elected Members, including the Leader of the Council, to discuss the positives and challenges they perceived were presented through the transformation programme
 - Outreach to Scrutiny members to understand their expectations from the report
- Workshop design, delivery, and facilitation
 - Workshop one attended by Senior Leadership Team (SLT): re-introduction of the benefit drivers and cultural change experienced in the organisation. Discussion of high-level successes, challenges, and future aspirations
 - Workshop two attended by LMT: gaining wider insight into the successes and constructive points for the programme. Facilitation angled at root cause analysis of challenges
 - Workshop three attended by LMT:
 - Developing/prioritising a range of operational improvements from the themes identified in workshop two to enable the organisation to continue to progress. This was with a view that the transformation programme will close, and these identified improvements will therefore form part of business as usual, moving forward
 - Developing a view of the organisation's wider context and future strategic drivers, and use the programme as a platform of achievement and learning for the future (e.g., Stronger Somerset)
 - Workshop four attended by SLT: review of outputs and findings from the workshops and discussion of the final deliverable

3. Assessment findings

3.1. Overall assessment

Positives:

In general terms, our assessment is that the organisation's culture and ways of working has been positively impacted by and through the transformation journey. For instance, the research suggests there is a more customer centric approach among staff, supported by agile working and learning from the change. The organisation's staff have become more adaptable, flexible, and resilient and the transformation programme helped with the organisation's response to Covid-19.

Regarding the financial benefit or savings identified in the business case for the programme, our assessment is that this has been achieved and this is detailed in section 3.2. This conclusion is also supported by an assessment by the auditor. The transformation programme has also created various opportunities for staff to upskill and work in other areas of the organisation.

We note that historically, prior to the Transformation Programme, the organisation had attempted to embed various change initiatives, which had not gained traction amongst teams and individual staff. For instance, the attempt to integrate the lean methodology into services units which among other benefits, was to identify waste in processes and procedures and remove this waste. We also received commentary that suggested that prior to transformation the ability to succeed in any form of change initiatives, either minor or major, across the organisation was extremely difficult due to deep seeded ways of working.

Challenges:

We recognise that with any transformation programme of this size, which covers pan organisational change in ways of working, will create significant disruption for the organisation at the organisational, team and individual staff levels. A level of disruption through the programme was anticipated and expected at the outset, with steps taken in the programme to minimise this wherever possible. For example, support was provided to staff to deal with change as well as to understand, apply for, and emerge in roles that they understand and in which they could add value.

We also recognise that disruption is not necessarily a negative, and often deep seeded cultures and ways of working in any organisation often need a level of disruption to break down barriers and encourage fresh perspectives and approaches. What follows are our observations regarding where learning from the programme can be applied to future improvement work.

We note that programme management could have been more rigorous, and programme mentality could have been stronger. The transformation programme business case provided a blueprint as a target future state for the organisation and it is the design and delivery of a strong programme plan with effective controls that realises this blueprint and amends as required. Monitoring the programme allows the link between the programme initiatives and activity, to the benefits case, and monitors this by holding projects and workstreams to account in delivering the required outputs. However, it must also test the linkage between project outputs and the target benefit expected from these outputs.

The plan at SSDC should have evolved as external and internal factors changed over time and delivery and benefits realisation need to be tightly monitored to fairly compare outcomes of the programme and robustly justify variance from the initial blueprint. For example, statutory obligations may have increased throughout the programme in areas such as homelessness or development control. On a positive note, moving forward, it should be recognised that such changes outside of an improvement programme scope can create a growth position that needs to be addressed, but which may not have been accounted for in the initial blueprint.

We understand, although Members appreciated the need to change, finding a rhythm in how all Members engage with the council on change is also a cultural change that takes time. That being said there was strong sponsorship with all the Elected Members signing off the business case for change, which is a positive and a working group of Members from across all groups participating in the design of the changes that affected Members. We understand that throughout the programme there was considerable effort made by the Senior Leadership Team to update the Elected Members regularly with progress reports and provide them with opportunities to question and input into the transformation journey.

Feedback we received was that some staff feel that the FTE numbers were reduced before the required changes in ways of working were ready to supplement this reduction in FTE. However, the scale of change in genuine transformations inevitably causes disruption; this tension was recognised and communicated throughout the programme. We understand that due to the financial savings required by the Council the FTE reductions needed to be made in a short time frame to avoid cutting services before they could be transformed and therefore inevitably there was going to be pressure on ensuring the changes in ways of working were made to coincide with the reduction in FTE.

Consistency has been a challenge with certain teams and services progressing towards the future state blueprint faster than others, and some teams have had to work hard to pick up activities that have slipped through the cracks. We also believe that the challenges that the planning team experienced have overshadowed many of the positives of the transformation journey. As noted, the organisation had to make the required FTE reduction financial savings to meet the shortfall in the medium-term financial strategy and therefore needed to implement the transformation programme at pace.

Concepts to consider for future improvement work:

The following are our recommendations for aspects to focus on for further improvement work for the organisation. This is not to say that these themes were not apparent through the transformation programme, rather some of these can be strengthened as part of change and improvement work, moving forward.

- As you have achieved already, continue to source and secure Elected Member awareness of the improvement journey and seek their sponsorship and buy in
- As you have achieved already, continue to engage staff, again to ensure buy in and sponsorship, and fit for purpose improvements
- Ensure robust programme and change management and governance
- Develop a change authority, to oversee and coordinate all improvements
- Take an adaptive approach to implementation, therefore implement to plan, however constantly review the plan, and amend as needed. And ensure stage-gate reviews
- Create a sharp focus for each team in transition that is closely linked to benefits realisation, transferring accountability to staff, and embedding these in-service plans where

appropriate. For example, designing and deploying specific sets of online forms and delivering defined, co-ordinated campaigns to deliver targeted and measurable increases in self-serve

- Consider the strategic variables for the organisation such as local government reform, when prioritising and implementing improvements. This will help to mitigate the risk of 'lost' investment if significant changes impact the organisation

3.2. Financial benefit

Part of the engagement was to assess whether the organisation had realised the financial benefit associated with the programme.

The business case projected a financial benefit of **£2,483,925** with a one-off investment of **£7,448,155** (payback period of approximately three years). This figure projected a reduction of **77.3 FTE** from the organisation's staff population.

In our assessment we:

1. Reviewed the business case, which underpinned the organisation's transformation programme, and which was signed off by Elected Members
2. Reviewed SWAP's two internal audit reports and supporting information (benefit tracker update and transformation programme progress report)
3. Reviewed the internal audit and programme approach to benefit realisation with Alastair Woodland and Adele Mitchell, from SWAP

The following were noted as successes and/or strengths in the programme approach to managing benefit:

- The SWAP internal audit in November 2019 confirms that **£2,483,925** recurring savings were achieved
- The internal audit reports and supporting information suggest calculations ensured (or were adjusted) to generate a like-for-like comparison in terms of:
 - Assumptions relating to NI and superannuation appear to be the same
 - Salary (SCP) points appear to be the same (so reported savings have not been eroded by inflation)
 - Roles in scope (although this cannot be confirmed from the calculations provided because roles out of scope are omitted from establishment data in both the baseline and new operating model)

The following could be made more explicit in the calculations. Effective benefit management requires these areas to be monitored throughout the programme:

- The internal audit reports and supporting information make no comment in respect of adjusting for:
 - Growth positions (e.g., increases in activity due to external conditions such as changing statutory obligation or internal conditions such as a changing strategic emphasis). Not adjusting for growth positions can cause programme benefit to be under-reported and/or additional financial efficiency to be applied in the new

- operating model (because medium term financial plan issues that would apply regardless of the transformation programme are being implicitly absorbed by the programme and compared to a baseline where comparable activity did not exist)
- Newly deployed roles, funded through income or grants (existing, increased or newly acquired as a result of configuring roles differently). Roles in the baseline appear to be offset by **£95,761** in external funding which is not apparent in the costing of new roles. If grant funding has reduced the baseline cost and has not been recognised against the costing of new roles when calculating benefit, financial benefit may be under-reported
 - Changes in delivery models (e.g., a change to in-house staffing levels due to outsourcing arrangements, shared services, LATCo etc.). Moves to insource activity from an outsourced position can result in under-reporting programme benefit, and vice versa
 - 19 posts have entries totalling **£323,060** for “taken as savings already”. It is possible that these should be reported as additional programme benefit (either ongoing or in-year) if:
 - These posts are included in the transformation baseline; and
 - The budget may have otherwise been spent in the absence of the transformation programme (for example, they were vacant posts removed from the establishment that were not recruited to prior to consultation in order to reduce redundancy and transition costs)
 - The SSDC Transformation – Progress Report (July 2019) states that “efficiencies from supplies and services made possible by the programme and the enhanced capacity for income generation are not included”. This suggests additional efficiency in supplies/services/third party spend may have been achieved as a result of the programme but not considered in benefits management

The following development relating to additional transition resources delayed the achievement of some of the staff savings as capacity was required to maintain service levels when it became apparent that some of the benefit drivers and efficiencies, would not be delivered in time. Additional staff resources (i.e. above the transformation target level) of **£494,990** for 2019/20 and **£240,230** in 2020/21 (total **£735,220**) were approved in 2019. This means that whilst by far the majority of the staff cost savings were achieved on time, some of the anticipated staff savings were not achieved in early 2019 as planned. There is a risk to financial benefit relating to this capacity if temporary resources remain in place.

Overall, there is consensus across the organisation and through the audit assessment by SWAP, that financial benefit was realised and has contributed to SSDC’s overall robust financial position. The above summary highlights the need to monitor clearly defined programme benefits, which respond to (but are not the same as) the council’s overall financial position and MTFP challenge.

3.3. Benefit drivers

In the original business case, the four benefit drivers below were identified as the areas for which efficiency needed to be unlocked in the transformation programme. The benefit drivers and descriptions are:

1. Customer enablement benefit, which involves reducing or shaping demand to reduce the level of service required from customers. For instance, intervention and prevention,

education campaigns to change customer behaviour and providing better information to customers so they can answer their own questions.

2. Customer channel shift benefit, which involves enabling customers to do more for themselves and reducing council workloads in the process. For instance, end to end online processes, self-tracking and problem solving and supporting alternative channels.
3. Technology and processes benefit, which involves stripping out waste and non-value-added activities from customers journeys and processes. For instance, end to end workflow, document management and integrated systems, a single view of customer information, mobile/agile working, and simplified processes.
4. Remodelling benefit, which involves improving productivity and releasing capacity in the organisation through the reallocation of work, workforce optimisation and better workforce practises. For instance, shifting work and knowledge closer to the customer, by embedding rule based 'knowledge' into processes and scripts, developing agile working and genuinely customer centric attitudes and behaviours.

Our assessment, which is based on the maturity of the organisation prior to transformation and following transformation, relative to the four benefit drivers above, is that the following efficiency has been achieved across these drivers against the target:

1. Customer enablement benefit – 86%
2. Customer channel shift benefit – 79%
3. Technology and processes benefit – 61%
4. Remodelling benefit – 83%

Further down in this report we make our recommendations regarding what future improvements could be made for each of these four benefit drivers. Directly below however we provide our assessment of what has been achieved for each of these benefits drivers. We recognised that the organisation is on a journey and this closedown assessment is to assess how far it has come, but as important is to consider what is next in continuing to progress with its ways of working.

3.3.1. Customer enablement and customer channel shift benefit driver findings

- Across the organisation there has been a mindset shift to reduce customer demand where possible and initiatives have been put in place to support this
- There has also been an accompanying behaviour change for a large majority of the organisation's customers
- There has been an increase in information available online for customers
- There has been a significant channel shift for customers to self-serve, now approximately 73% (measured by extrapolated maturity assessment improvements between 2016 and 2020)
- With the previous point noted, we recognise that the organisation continues to offer customer service tailored to the needs of the customer, such as phone and face to face contact
- A coordinated organisational approach to reducing customer demand is yet to be achieved

3.3.2. Remodelling benefit driver findings

- Through the programme, teams and individuals were empowered to become more resilient and adaptable to change and we believe this certainly helped with the organisation's response to COVID-19
- A positive is the opportunities this remodelling has created for many staff and the 'fresh energy' that was created in the organisation
- There is a continued need to embed and confirm roles and responsibilities of the new structure with staff and teams
- Overall, the remodelling caused, naturally, a high level of disruption for the organisation, however as noted above this remodelling was required to achieve the level of FTE savings needed

3.3.3. Technology/processes benefit driver findings

- The organisation has learnt a lot about its digital capabilities and has reconfigured its digital team to increase capability, capacity and be a more effective "intelligent client" in managing supplier relationships
- Key pieces of technology capability have not been delivered, for example online bookings, the master customer record and more extensive use of mobile technology
- Early process redesigns did not always optimise the benefits with many resembling closely the previous process but on a digital platform. This caused many to be revisited and the organisation has learnt to introduce more challenge and a fresh approach to process redesign, rather than using the existing process as a starting point.
- There are still several services that would benefit from digital forms and workflow to increase efficiencies and release technology benefits, but are hampered by a lack of, or poor, interfaces and difficulties in configuring the Civica platform. The investigation into Robotic Process Automation and use of alternative solutions for intelligent forms may solve some problems but this technology has its own overheads to maintain
- Introduction of new technology capability or continuous improvement activity should be centrally coordinated and prioritised to ensure benefit is being delivered. We believe that moves are in place to make this happen
- The relationship with Civica has improved, from a low base when the product was launched
- Civica is seen as a blocker in some areas and there has been a push to use it, even though other supplier solutions may deliver similar or improved benefits
- The impending local government reform decision could be a driver for considering whether the Civica product should continue to be the central technology enabler for the Council

3.4. Culture assessment

As part of the Transformation Programme the council targeted a cultural change. This saw staff involved in defining what a modern South Somerset culture should look like and this being codified in an "Attitudes and Approaches Framework" for use in recruitment, staff development and appraisal. During the engagement, the requirement was therefore also identified to complete an assessment of how the overall organisational culture at SSDC has been influenced by the transformation programme.

To achieve this, we asked this specific question as we worked through the various engagements we completed. We also had a specific focus group allocated to culture change, in the workshops we completed, and we also reviewed the recent results for the employee engagement survey.

Our assessment findings are as follows:

- Overall, transformation has had a positive impact on organisational culture
- The organisation and staff were historically quite traditional in their approach to ways of working; however, the transformation has reshaped business as usual ways of working and the organisation is more transparent, united, flexible and open in many ways
- We observed a sense of pride amongst staff, of how far the organisation has come, and examples were given freely comparing the strengths of SSDC with other local authorities
- Commentary received has suggested that prior to transformation many staff were unaware of what was possible regarding different ways of working, whereas now there is a much stronger awareness and a desire and mindset to continue to improve
- We note the results from the employee engagement survey out of the 41 questions asked, 36 of these (88%) have improved
- These shifts have been in perceptions of strong leadership, performance management, an environment where agile working is enabled, learning and development for staff and a general happiness at work
- With that said progress is still to be made in changing certain ways of working that go against the ethos of the organisation, however this is certainly the exception, not the norm
- We observed there are still certain challenges in some pockets regarding workloads and ways of working, placing pressure of various staff members
- There is also still some work to do in addressing the silo mentality in some parts although this is less prevalent than it was, and growing the organisation's goal of becoming 'one team'

3.5. Other improvements made by the organisation resulting from the programme

This engagement focused on assessing the benefits that were identified in the initial business case for transformation. With that said however, there have been a range of other improvements and benefit realised that the organisation has delivered, alongside those that were specific to the transformation programme. These were highlighted to us through the various engagements and we consider it important to note in this report.

The following notes various example of these and this is not an exhaustive list:

- Transformation and cultural change provided the platform to grow a successful commercial team very quickly
- The organisation is honest about successes, failures and learning opportunities. Maturity assessment analysis has shown a clear trend of eliminating 'unconscious incompetence'
- The new Customer Connect working area and environment

3.6. Deep dive assessments

As part of the transformation assessment, we were requested to complete two deep dive assessments for the Planning Team and the Customer Connect Team. To complete these assessments, we held two deep dive workshops with staff from each team.

In these workshops we guided them through a series of questions, including asking what positives have been experienced by their team, what challenges have been experienced and as importantly; what initiatives are in place to increase the team's ability to provide excellent service to its residents.

Alongside these engagements we also reviewed documentation such as the planning service project plan, which is a plan incorporating several improvements to the service.

Below are the findings from our deep dive assessments.

3.6.1. Planning Team

Positives of the programme:

- There was positive engagement from the team during the redesign of processes
- The staff involved in redesign offered many good inputs into the process reviews
- The process of change helped the team become more ruthless about the improvements needed
- The indexing and scanning activity have been moved to the digital mailroom
- The use of locality officers in the planning process has been positive, e.g., site visits and the displaying of notices
- There has been a healthy team spirit maintained throughout the process, despite all the challenges they have experienced
- COVID-19 meant the team had to work together to find ways to collaborate and communicate more effectively and efficiently
- The level two portal integration is now in place and working
- The department is largely paperless, which has been accelerated by the COVID-19 pandemic
- Digitisation has helped with the passing of work and managing planning cases

Challenges of the programme:

- The suggested process changes could not be fully replicated within the technology
- Resources in the digital mailroom can be a challenge for the team
- Members struggle with the new ways of working for the planning team
- Workloads remain high due to resourcing issues
- There has not been a full complement of staff in the team for some time
- The new validation process is more transparent, but there are still challenges
- The planning specialists felt that they lost support from the case team when they were not physically co-located
- The split between case management and specialists inhibited support and learning between the two teams
- Feedback from the team is that agency staff did not always perform as they were expected to
- Certain staff in the team feel discouraged by the changes
- Feedback from the team is that visibility of workloads and case tracking needs to be introduced
- Interfaces with IDOX (technology) have not delivered any automation

- Uniform is not being used to its maximum potential and there are opportunities to increase automation
- There is frustration that some of the challenges of the programme were not anticipated
- The team would benefit from more mobile technology functionality and the ability to see digital plans

What is in place to resolve these challenges:

- Improvements to processes are scheduled but have been paused due to COVID-19
- Ideas for improvements presented by team members are being captured in a central repository
- There is a project planning team with more resources to help facilitate the change needed
- The development management project plan and progress against this plan is regularly shared with the governance board and members
- There have been workshops with Elected Members to develop how members interact with the planning team
- The scheme of delegation is changing, aiming to reduce the number of householder applications needing to be taken to committees
- Additional temporary resources have been introduced to the team to support with workloads
- Blitz team sessions are in place, as well as mentoring for junior staff
- There are many positive lessons learnt to take forward about how to advertise roles and recruit staff, for the best outcome
- There have been additional resources introduced for enforcement
- IDOX uniform changes have been raised with the digital team as a priority
- There is work being completed with the digital team to trial new devices for on-site and mobile working

Our summary findings of the planning team:

The Planning Team have struggled with resourcing over the period of the transformation programme and the technology and process workstream did not deliver all the proposed improvements. Also, some of the staff who were in roles prior to the transformation have now left the organisation which resulted in experience being lost.

The team struggled with the split of case management and specialist activities and steps were taken to ensure the team continued to work closely together. However, the home working imposed by Covid-19 has also presented challenges in the achieving their goal of the continual skills development of new as well as existing members of the team. The team have implemented team sessions where knowledge and experiences can be shared amongst the team for the benefit of all.

An improvement project is now in place and there are several improvements that should help the team to manage workloads, within the compliment of staff within the function. In the meantime, additional temporary resource has been brought in to help in the medium term whilst recruitment to the permanent positions takes place to achieve a full complement of staff.

3.6.2. Customer Connect Team

Positives of the programme:

- Customer Journeys have improved with the introduction of the website and via assisted self-service over the phone
- A wider range of calls across council functions can now be addressed by the team
- The team has access to more information than ever before that can help answer enquiries
- The Customer Connect space has been a very positive experience for customers with great facilities and dedicated meeting spaces
- The team can spend more time on complex problems as simpler enquiries have been shifted online
- The team feels like a close-knit unit that works together towards a common goal
- Job satisfaction has increased through having more ability to proactively help customers and solve their problems
- The team feels valued and believes the council understands the important role they play in delivering services
- Self-service terminals in the Customer Connect space have encouraged channel shift
- Features of Connect360 (Civica) are now operating
- Many of the online journeys are better and simpler than they were before
- Strong surge in online transactions, strengthened by the Coronavirus restrictions
- A largely paperless environment has made a difference and information is easier to find
- The self-service and payment areas of the website have reduced demand via the phone
- Group chats and other tools are in place to help the team to collaborate and learn
- Access to more data and information mean that the team can do their job more effectively
- Where technology fails, the team are proactively finding workarounds to keep delivering good service
- Customers have responded well to efforts to have them self-serve, e.g., emailing them a link and direction to website

Challenges of the programme:

- Communication and consultation with the team could still be improved to manage peaks and troughs of work and call volumes
- The team can sometimes be informed late about outgoing communications or new initiatives
- There are still a minority of customers that will not/cannot interact with the council online
- Some customers still say they cannot find information on the website or it is too complicated
- More agent scripting could be introduced on Connect360
- Delays in introducing the new telephony system mean the team are yet to see the benefits
- System glitches cause the team issues e.g., remote desktop dropouts on a Wednesday

What is in place to resolve these challenges:

- Encouraging more specialist teams to join Yammer and inform the team when changes are being made or large mailings are being sent out
- The team continues to be proactive in amending the website if they receive feedback that it could be improved
- The team finds new and innovative ways to encourage the shift to digital channels and share their best practice within the team
- The team lobby for more work to be brought into Connect360 to reduce the number of systems in use

Our summary findings of the Customer Connect Team:

The inception of the Customer Connect team has been a success, with an extension of breadth and depth of enquiries that can be handled at the first point of contact. The team has also an excellent customer ethos.

The new Customer Connect hub in Yeovil town centre has improved the customer experience and has promoted self-service and assisted self-service, prior to the Covid-19 pandemic. The introduction of the new website has provided a good resource for the team to be able to answer customer enquiries and re-direct customers to online channels.

The team are still hampered by the lack of visibility of customer cases on the main software system, Civica, and they need to access up to 16 systems to answer queries. They feel that they can make further improvements to the information that is available to staff in the customer connect team but are reliant on the digital team to do so. The hope is that they will have the ability to craft agent scripting for themselves, to accelerate the pace of development of the information available.

4. Assessment recommendations

We recognise that the organisation's intention is to officially close the transformation programme, and our assessment forms an important part of this process.

However, SSDC is committed to continue to improve its efficiency and effectiveness in delivering for customers and to make changes where required. Therefore as part of the assessment, we were asked to consider what improvements the organisation could make next on the much longer-term journey of it continuing to improve and grow its ability to provide excellent service to its residents.

Below are improvements that we believe could be made next from an operational perspective. With the transformation programme officially ending the question for the organisation will be how it manages and governs future improvement work. We recommend the organisation select a governance mechanism that is fit for purpose for their needs to design, implement and track these improvements.

We also recognise there are much bigger questions for the organisation with the external influence of local government reform and how the organisation may be structured in the future. We also see it important to ensure that investment made in improvements will naturally reflect any possible larger changes in the organisation's construct.

It is important that the organisation continues to invest in ensuring that staff remain adaptable and resilient and that there is a healthy level of 'change readiness' across teams and at an individual level.

4.1. Customer enablement/customer channel shift benefit driver

Potential Project	LMT Priority	Target Outputs	Example activities
Review Customer Access Strategy (2018)	1	<p>To update the approach/principles to delivering high quality modern services:</p> <ul style="list-style-type: none"> Defined customer base/segments Review measures through which outcomes are monitored and explicitly define current and target performance for online transactions Introduce measures (aligned to customer segments) to monitor current and target performance of all channels in addition to online (including to monitor accessibility) Define accountability and responsibility for key aspects of channel shift and engagement Clear action plan for the next financial year to achieve trajectory of target measures 	<ul style="list-style-type: none"> Customer communication/engagement/feedback Updating demographic and benchmarking data in the current Customer Access Strategy to inform customer segments/groups, measures and targets Defining the principles for the prioritisation of channel shift activity (for example, complexity, transaction volumes, customer needs, strategic priority)

4.2. Remodelling benefit driver

Potential Project	LMT Priority	Target Outputs	Example activities
Career progression framework	1	Formalised routes of progression: <ul style="list-style-type: none"> The expected/typical options/flows of career progression The criteria that must be met to meet career progression thresholds 	<ul style="list-style-type: none"> Embedding approach into personal performance plans Communicating the vast options of career progression available for staff across the council
Review strategic planning cycle	2	Ensuring a golden thread through the Corporate Plan, service plans and individual performance plans: Defined current and target performance at each level Clear systems to monitor and intervene on: <ul style="list-style-type: none"> The validity of the relationship between individual, operational and performance metrics Progress against metrics set out at each level 	<ul style="list-style-type: none"> Defining the contribution of core statutory services in realising Corporate Plan priorities so staff understand their role in delivering strategic goals Gathering baseline performance data
Flexible staffing initiative	3	A defined scheme to rotate staff and provide secondments to: <ul style="list-style-type: none"> Maximise utilisation across the organisation (against defined measures of success) Maximise career progression opportunities (against defined measures of success) 	<ul style="list-style-type: none"> Designing shared budgets approach and related governance Defining measures of success across intended strategic impact and efficiency Defining criteria for selection of staff
Case Services resourcing model	4	A resourcing model that clearly defines how multi-skilled resources are trained and deployed: <ul style="list-style-type: none"> Maximum utilisation/efficiency of resources in multi-skilled teams Flexibility in multi-skilled teams that allows the organisation to adapt to changing internal or external factors 	Defining target state of Case Service teams in terms of: <ul style="list-style-type: none"> Typical/average service requirement (FTE) by service or technical discipline Competency levels for technical disciplines (i.e., what constitutes grade 2 activity or grade 5 activity) Multi-skilling requirement for any individual across these disciplines and competencies to meet organisational need (strategic focus, resilience)

4.3. Technology/processes benefit driver

Potential Project	Priority	Target Outputs	Example activities
Implement the technology architecture and roadmap	1	A clearly defined and adopted view of the application and infrastructure layers of technology capabilities, including the	<ul style="list-style-type: none"> Reviewing the use of Robotic Process Automation to reduce reliance on supplier APIs or filling API gaps for

		<p>linkages that will deliver the remaining technology benefits, including:</p> <ul style="list-style-type: none"> • Creating the master customer record view and removing re-keying duplication • Delivering capability gaps across bookings, mobile capability etc. • Agreeing the capability that will deliver the benefit i.e., Civica or another solution 	<p>interoperability between systems</p> <ul style="list-style-type: none"> • Create a data architecture to define where data will be captured, stored, shared and displayed. Data is used re-used efficiently and is readily available for performance management and resource planning activities
Review and prioritise technology capability development	2	A defined and prioritised technology and process improvement backlog and a forward roadmap of activities that will deliver business benefits to customers and the council	<ul style="list-style-type: none"> • Create a design authority group that can assess and prioritise future developments in a transparent way • Consider introducing an agile approach to rapid discovery and identification of benefits and use of scrum to build buy in and a solid delivery team • Build a product backlog of technology developments linked to clearly defined business cases and benefits • Regularly review and re-prioritise the list and assess the business case
Incremental technology process improvements	3	<p>Grow and nurture an environment where technology process improvements can be explored, tested and implemented, empowering managers and staff to experiment and introduce changes.</p> <p>This would fit into the continuous improvement approach under SPG</p>	<ul style="list-style-type: none"> • Promoting small incremental change as a valuable use of staff time and creating the conditions for work to happen • Introducing lean techniques like Kaizen to govern continuous improvement activities • Sharing success stories and promoting good practice
Expand digital channels	4	Expanded digital options for customers to interact with the council, find information and request services and reduce low complexity/high volume demand through Customer Connect	<ul style="list-style-type: none"> • Consult customers views on automated chat • Investigate and trial the use of automated bots and artificial intelligence to create interactive forms or chats • Investigate voice services such as Alexa