My Account Project

Project Scoping

November 2021

Principles

- Solution to deliver the same or better outcomes for either staff and citizens

- Single accounts for citizens and single sign on for staff wherever possible

- Templates for forms to be created and elements reused wherever possible

- Simplify the customer journey

- Eliminate duplication

Project Delivery Phases

- Phase one – first phase of project delivery anticipated June 2022 - as-is solution with some improvements

- Phase two – improvements which will require additional resource

- Phase three – significant improvements which will require additional resource

Scoping Options

Option	Phase 1	Phase 2	Phase 3
Customer Accounts data	Customer details in CRM used to Login for services that require identification / Pre-populate address and contact in forms. (Where appropriate options for anonymous reporting allowed)	Identify caller from Telephone Number when calling into customer services and auto populate customer details (CSO does not need to look up). Allows "Forget option" for anonymous reporting.	Chatbot integration with Customer Account
Customer web portal	Customer Web Portal account linked to contact account in CRM (Single user account). Single account area for the customer online to view all jobs raised / check status of a job and view updates.		Portal integrated to back office systems
Capita academy integration - Council tax account information linked into customer web portal	As is process	Link in directly to capita API's and populate information in a verified "My Account" area (customer portal)	Increase self service functionality

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Account data - mastersource	As is data - for go live carry over customer web account and 1 years worth of CRM customer data (recent contacts)?	Take data from key systems to create CRM account record (and de - dupe)	All Systems updated via CRM customer Data / Golden Record single source of truth
Define standard template for forms. (i.e. contact format etc. Title List / name format / default contact)	Reusable template for names / contact / payment / target address	Use the same forms - standard service between platforms / easier to maintain processes	
Customer Services / Website Self Serve will use the same process. (Supplier to be consulted on call redaction for payment process)	Different processes currently used between platforms.	Use the same forms - standard service between platforms / Easier to maintain processes	
Form Replacements	Replicate current forms (CRM / Web / Contour) and add small improvements to processes dependent on technology. IE - "Inpage Branching" etc.	Update processes / engage with service areas and business analyst to update front facing customer requirements and offer technological solutions	Engage with service areas, update end to end processes within CRM / Fully digitise all processes suitable for digitisation and integrate to back office systems.

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Address Lookups	Address Lookups will be BS7666 compliant and also pull back UPRN of property.		
Rest Service Integration	Allow data from Web Restful services to be pulled into / populate forms		
Payments Integration with Capita SCP	Allow payments to be taken as part of forms process		All Payments (website and customer service) via same Capita Portal
Civica Integration	Two way system integration for Bulky Waste	Expand integration for other services (Bin Orders, Trade Waste etc.)	Full integration and further developments
BBLP Confirm Integration	One way system integration to raise jobs in BBLP's confirm system matching current integration	2 way integration (Updates back to customer record) and add additional services - public rights of way / Streetlights. Updates to Customer account to track cases	Full integration and further developments. Engage with BBLP to improve customer notification and case tracking system

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Customer Services Hub. Case tracking / queues / reporting service / SLA Maintenance	As is - CSO can view /search for case and update case and customer detail / simple reporting on request)	*See **back office interaction**	Full two way integrations into back office systems integrations / SLA Management and reporting suite.
Single sign on	Internal users - login by AD account.		
SLA (Service Level Agreements)	Set and monitor Service Level Agreements	Update SLA's via workflow in case process based on back office responses and classification of jobs.	
Reporting Suite	Preset Reports TBD by service.		
Back office system interaction	Send emails to back office on successful service submission (check with supplier on options for updating case by form)	Back Offices log in to system to deal with cases (work queues) / Update Customer / Emails automatically to customer (Visible customer SLA) - Customer portal updates	Full system integrations or RPA to manage updates to CRM and Master System.

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Councillor Portal: new portal for Councillors based on current customer portal	Automatic improvement as currently no function. Quick Win	.	
HMO System Replacement	Replicate current system – Workflow based on dates to manage certificate and licence renewal process for HMO and automate customer contact.	Make the process more efficient.	Digitise complete process, investigate and add new solutions such as robotic process automation to manage the end to end process / cycle from application to renewal.
Blue Badges			

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Mapping			