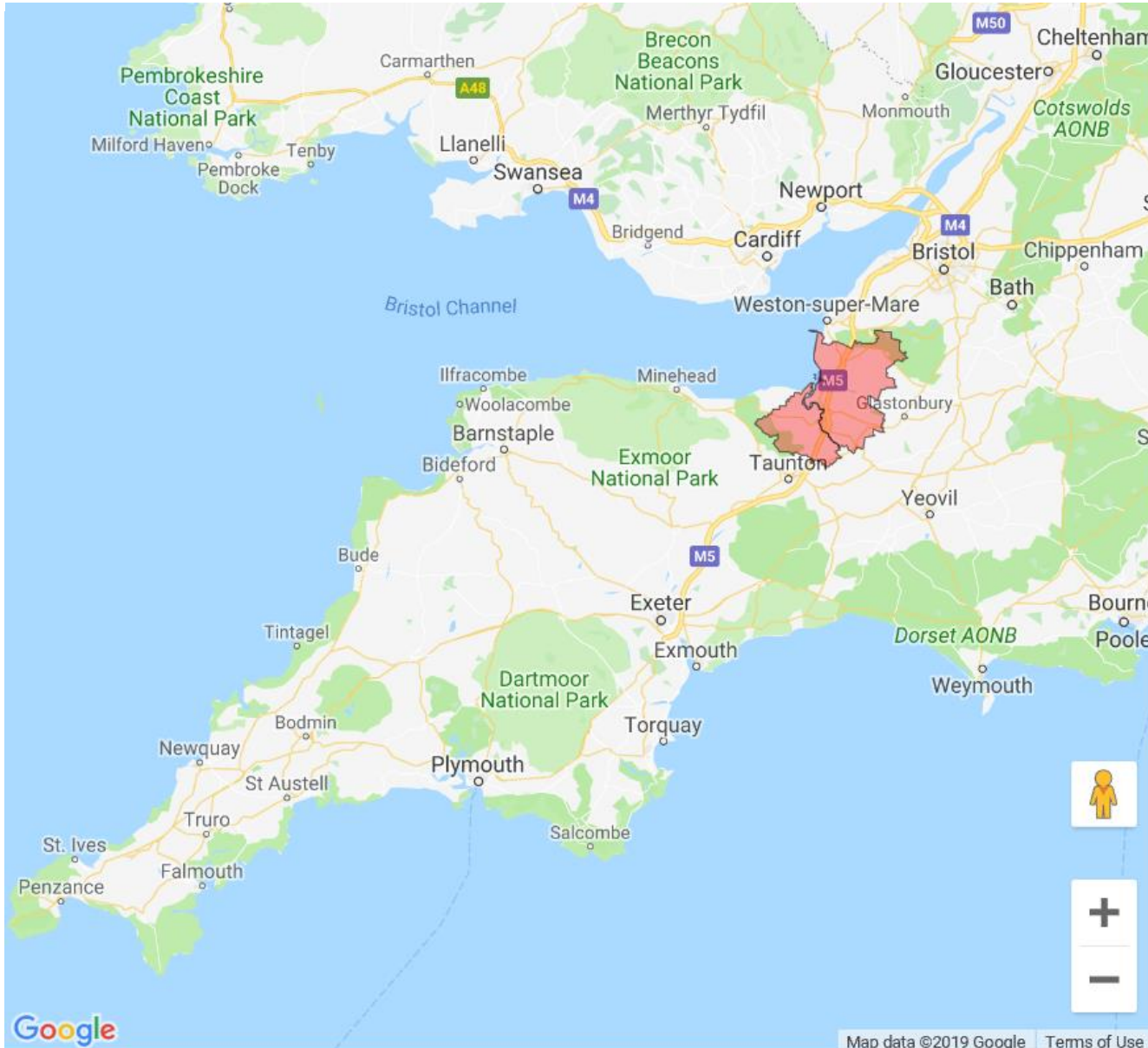# Process Costing at **Sedgemoor**

Using the Engage Process Suite.

To the Engage e-Conference – July 2020

Paul Davidson – Chief Digital Officer
Matthew Davidson – Business Analyst

About Sedgemoor

Vision for 'Transformation'?

- Sedgemoor's [digital strategy](#) lays out objectives including
  - improving the experience for our customers;
  - greater efficiency through the use of smarter tools;
  - improve decision making on the use of our resources
  - collaborate with partners and other agencies who serve our communities

- Transformation will affect everyone:
  - Its not just about Sedgemoor Direct (now Sedgemoor Digital)
  - Its not just about Customer Access

What is the ultimate goal?

7 Principles of Transformation

Each change we make should consider and align with these to achieve the brilliance that we seek!

1. Sedgemoor, the Council, and the place, will have a digital culture

To encourage digitalisation as much as possible throughout the entire community

2. A bigger role for Customer Services

Provide a one stop support access point, encouraging our Customers along with us on the journey

3. Casework preparation is handled by Sedgemoor Digital where possible

To create a more efficient customer journey for all involved

4. Customers can serve themselves where possible

Enabling self-service and encouraging it for as many services as possible

5. Performance information is automatically and consistently collected

Enabling Managers to have knowledge and confidence in their service and returns

6. Customers provide information once

To streamline the customer experience when speaking to different services

7. Everyone will use the platform to support their work

Any proposed changes must work for everyone, nobody will be left behind

The Team

- From the Transformation Programme
  - Process Redesign Manager
  - Senior Business Analyst
  - 3 Business Analysts

- From The Services
  - Practitioner
  - Change Agent

- Listening and Advising
  - IT
  - Customer Services

- Supporting
  - Agile Coach
  - Data Protection
  - Costings?

The Current Programme

- Discovery
  - Clean Surroundings

- Alpha
  - People/HR/Recruitment
  - Legal/Litigation/Procurement
  - Digital Mail Room

- Beta
  - Freedom of Information
  - Business Rates

Stage 1 Foundations - up to a week per theme
This is your very initial investigations, the detail is low at this point

Stage 2 Discovery – up to 2 weeks per theme
This is where we start to dig deeper and the detail builds further. You will explore the customer needs, evidencing their journey and how the customer feels about current provision, including current work volumes

Stage 3 Alpha - *The ideas phase* – up to 4 weeks per theme
This is where the real magic begins, you take the information from your Discovery and turn it into the BIG ideas. With the support of the Business Analyst, your Design Team will review your current processes, identifying digital solutions and efficiencies

Stage 4 Beta - *Assemble and Review*
Now the new digital processes and the requirements that go with it will be built and brought to life. We will then trial and review all changes to make sure it is meeting the expectations

Stage 5 Live – Let's GO!
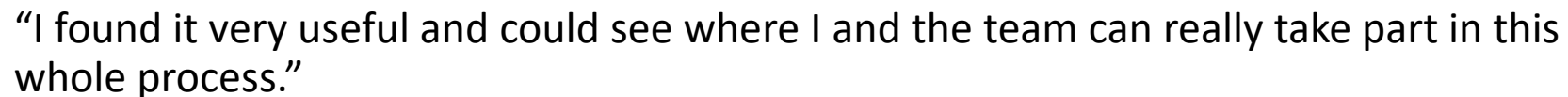You will launch your new process and begin to use them on a daily basis, training others and helping each other along in the journey

Structure and Culture

- Using 'Personas'
  - to map Processes
  - to work to a new organisational design

Administration	Administrator		Following a method to achieve an outcome.
	Case Officer		Owning a case through to fulfilment.
	Digital Mailroom		Capturing paper documents to a digital form.
	Mobile Locality Officer		Operating outside of the office environment.
Automation			Digital agent that can perform actions, apply decisions, based on predefined business rules.
Practitioner			Having specialised knowledge, skills and judgement in a particular field.
Delivery	Task		A unit or organisation who acts as our Agent to perform a specific task.
	Partner		An organisation who we collaborate with.
Manager			Using dashboards to tune performance, and allocate resources.

Process Redesign Environment

"I found it very useful and could see where I and the team can really take part in this whole process."

The approach to costings

- 'As Is' Maps
  - Steps tagged with the current Role from the Roles Table giving hourly rate
  - Steps tagged with processing time
  - Maps show 'Channel' options and the % use of each
  - All of the complexity and failures

- 'To Be' Maps
  - As 'To Be' – plus
  - Steps tagged to Personas – Swim Lane view

- Volumes and Channels
  - As a part of the Discovery Phase
  - Volumes now, and expected in the future
    - E.g. can we reduce demand, or promote a service
  - Channels now, and expected
    - E.g. channel Shift

Comparing As Is to To Be

- Apply
  - Volumes / Channels %
  - % on Decisions /Branches

- Run
  - Compare
  - Produces a list of roles / costs / times

- Rationalise
  - Back to Personas

- Report
  - On the Alpha Findings Report

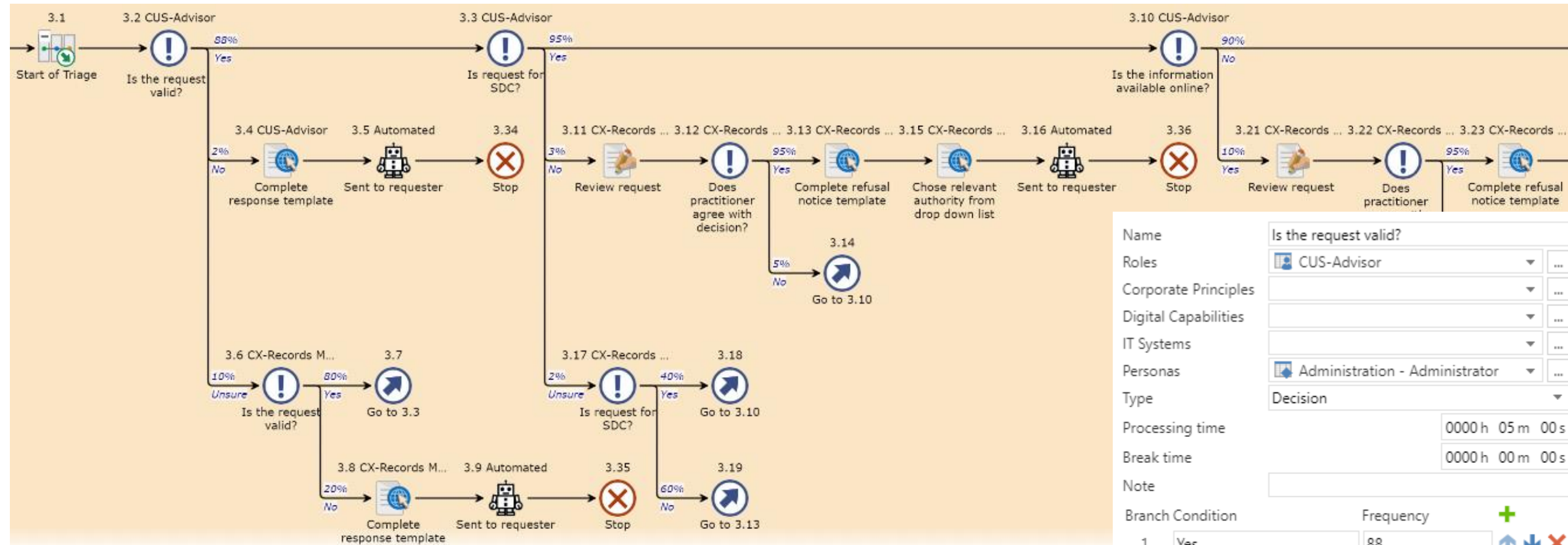# Freedom of Information phases

As-Is expanded

To-Be expanded

Properties comparison

As-Is

Name	Is request valid?	
Roles	CX-Records Manager	▼ ...
Corporate Principles		▼ ...
Digital Capabilities		▼ ...
IT Systems		▼ ...
Personas		▼ ...
Type	Decision	▼
Processing time	0000 h 05 m 00 s	
Break time	0000 h 00 m 00 s	
Note		

Branch Condition		Frequency	
1	Yes	95	⬆ ⬇ ✖
2	No	5	⬆ ⬇ ✖

Value added 🟢 🟡 🔴

Risk Point ☐

Documents   Input/output
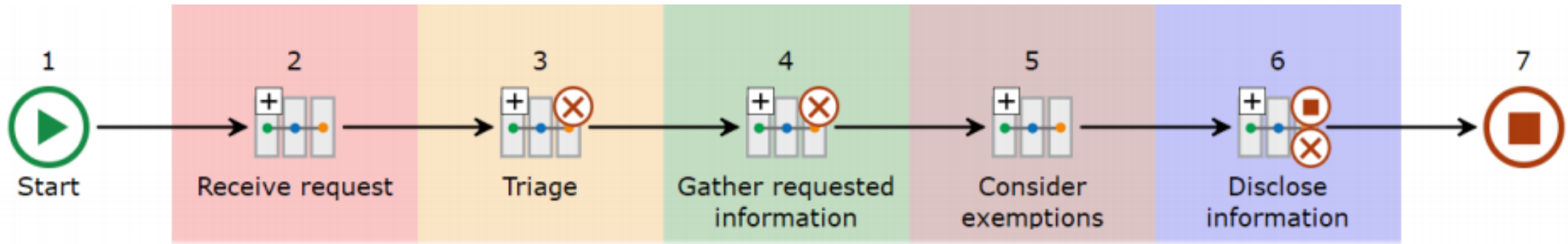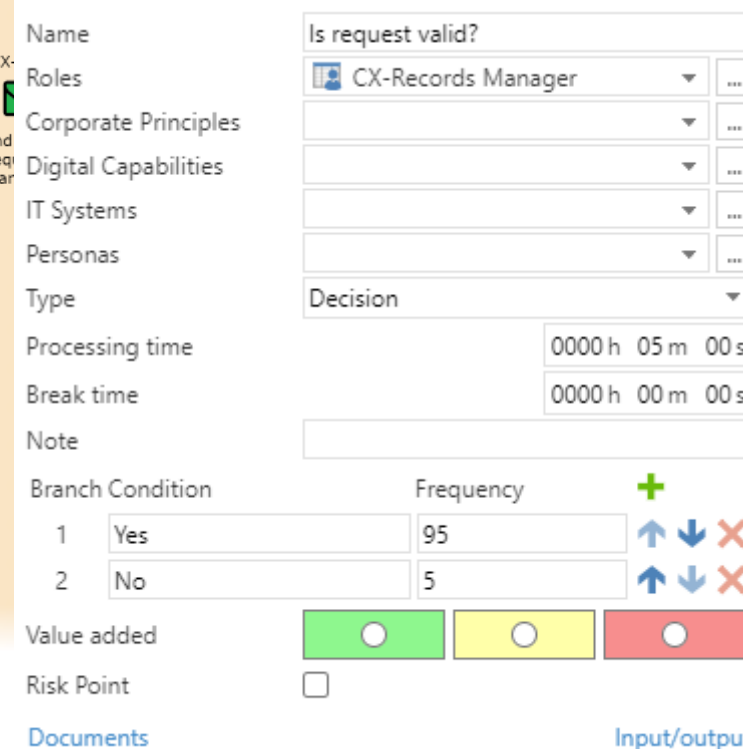
To-Be

Name	Is the request valid?	
Roles	CUS-Advisor	▼ ...
Corporate Principles		▼ ...
Digital Capabilities		▼ ...
IT Systems		▼ ...
Personas	Administration - Administrator	▼ ...
Type	Decision	▼
Processing time	0000 h 05 m 00 s	
Break time	0000 h 00 m 00 s	
Note		

Branch Condition		Frequency	
1	Yes	88	⬆ ⬇ ✖
2	No	2	⬆ ⬇ ✖
3	Unsure	10	⬆ ⬇ ✖

Value added 🟢 🟡 🔴

Risk Point ☐

Documents   Input/output

To-Be persona 'swimlane'
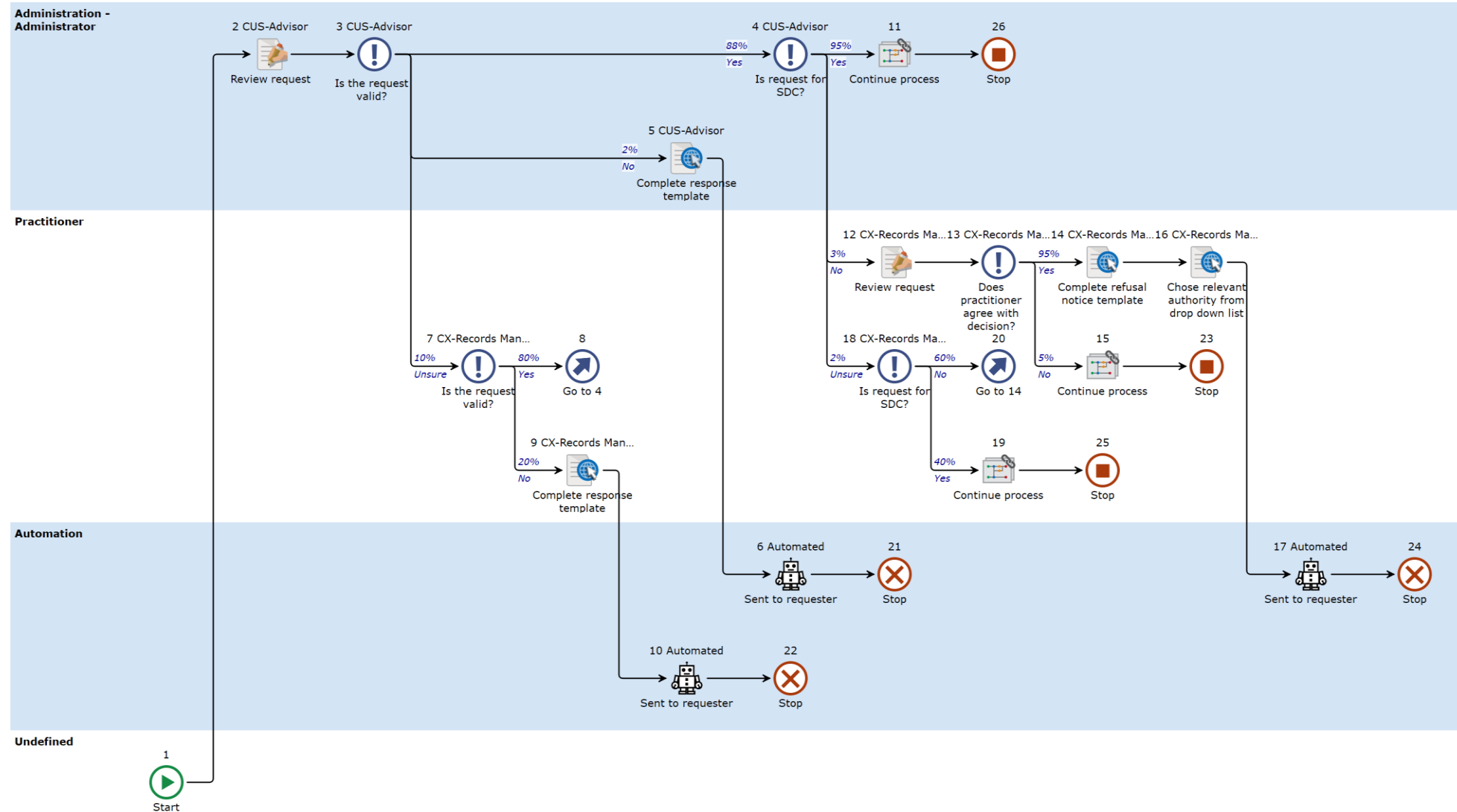
Volumes and usages report

			Trigger	Now	Expectations		Trigger	Now	Expectations
Trigger			Request information				Request for review		
Annual Volume	**in 2019**			733	600			6	6
Channels %	**Phone**			0	0			0	
	Web			1	95			5	90
	eMail			98	4			90	6
	in person			0	0			0	
	Mail			1	1			5	4
	Other								
	(total)			100	100				
% resolved at first point of contact?				5	30			0	0
% unable to action?				30	10			10	10

Costings comparison

Measures

Compare [FOI Request - As Is ▾] ⇄ with opened process [FOI Request - To Be ▾]

	FOI Request - As Is	FOI Request - To Be	Diff.	%
▲ Processing time	1520h 18m 31s	1050h 56m 25s	469h 22m 05s	-30.87
Customer	01h 13m 00s	95h 00m 00s	93h 47m 00s	7708.22
CUS-Advisor	02h 59m 35s	275h 16m 11s	272h 16m 37s	9097.12
CUS-Post - Scanning	01h 11m 05s	00h 30m 00s	00h 41m 06s	-57.80
CX-Records Manager	1514h 54m 50s	680h 10m 14s	834h 44m 37s	-55.10
Lead time	122442h 09m 31s	63865h 05m 40s	58577h 03m 52s	-47.84
Break time	120921h 51m 01s	62814h 09m 14s	58107h 41m 46s	-48.05
Total cost	27707.01	15518.61	-12188.40	-43.99
▲ Variable cost	27707.01	15518.61	-12188.40	-43.99
Customer	0	0	0	0.00
CUS-Advisor	33.64	3094.03	3060.39	9097.12
CUS-Post - Scanning	11.04	4.66	-6.38	-57.80
CX-Records Manager	27662.32	12419.91	-15242.42	-55.10

Findings report

Timings

Assumptions

- We receive 730 requests a year

Personas	As Is Time	To Be Time	Improvement
Practitioner	1514h	737h	Reduction in triage work, use of response templates.
Administrator	3h	286h	Handling the majority of the triage work.
Digital Mailroom	1h	40m	
Customer	1h 10m	115h	Use of web form

	As Is	To Be
Total cost	£22700	£16600

Benefits Realisation

Business Functions	Stage figures were recorded	Emerging Quantifiable Benefits			
Business Rates	Alpha	1. Yearly Time reduction of xxx hours or xx% 2. Yearly staff costs reduction of £x,xxx.xx or –xx%			
Digital Mail Room	Alpha	1. Reduction in Time of xxx hours yearly xx% 2. Reduction in staff costs of £xxx over a year xx%			
FOI	Alpha	1. Reduction in Time of xxx hours yearly xxx% 2. Reduction in staff costs of £xx xx% over a year			
Legal	Discovery				
People Team	Foundation				

Thank you

We share at
https://www.sedgemoor.gov.uk/cap

Your questions and observations?

paul.davidson@sedgemoor.gov.uk