

The background is a dark blue gradient. It features several decorative elements: a large green circle on the left, a large blue circle at the top right, and a large yellow circle at the bottom right. Scattered throughout are smaller circles in red, white, pink, and green. Many of these circles contain arrows pointing in various directions. Some arrows are solid, while others are dashed or dotted. The text 'Welcome to Perago' is written in a large, white, sans-serif font, with 'Welcome' on the first line and 'to Perago' on the second line.

Welcome to Perago

Step 1: Join our “perago” wifi
Password **Officedragon23!**

Step 2: Head to your mobile app store
and search “Engage Process Brainstorm”

Step 3: Help yourself to Tea or Coffee

The logo for perago, featuring the word "perago" in a white, lowercase, sans-serif font, followed by a white circle. It is centered within a large, solid dark blue circle.

perago●

A white ampersand symbol (&) centered within a small, solid orange circle, which acts as a connector between the perago and Engage Process logos.

&

The text "Engage Process" in an orange, sans-serif font. "Engage" is on the top line and "Process" is on the bottom line, both right-aligned with the icon to its left.

Engage
Process



Agenda



10.00-10.05 Welcome | Victoria Ford, Perago

10.05- 10.15 The Changing Role of Process Management | Engage Process

10.15- 10.45 Creating the Right Environment for Change | Tim Daley, Perago

10.45 - 11.15 Building a Service Catalogue | Caerphilly County Borough Council

11.15-11.30 | Break

11.30-12.00 Project Visioning: Capturing & Analysing Opportunities | Torfaen County Borough Council

12.00-13.00 | Lunch

13-13:45 Removing the 'Waste' from Waste Collection & Looking Forward from the 'Front Door'
| Rhondda Cynon Taf County Borough Council

13:45 – 14:45 Introducing Digital Services: Redesigning Service & Savings
| Wrexham County Borough Council

14:45 – 15 Close | Drinks & Networking

WIFI password: Officedragon23!



Victoria Ford
Managing Director



Dave Floyd
Director of
Operations



Tim Daley
Strategic &
Transformation
Director



Cory Hughes
Strategic Design
Director



Chris Elias
Strategic Design
Director



Lucy Hughes
Office Manager



Sarah-Jane Fea
Marketing &
Communications
Manager

About us

People often ask
what perago means:

Our name is based in Latin
and means: To finish.
Accomplish. Complete.

To us, it means
delivery.



→ DESIGN

→ DELIVERY

→ COMMUNICATIONS

We have expertise in user centred design,
delivery and communications and the
experience to deliver projects across a
variety of sectors.

By combining our team with yours we
deliver outcomes rooted in business and
user need.



perago

Governance & People Driven Change – the basis for Transformation

- **WELSH SESSION** -

15th of October 2024

Ted Twaalfhoven
Nick Hill, Dean Stratton, (Winola Wong)
Andy Sandford - WALAA

MISSION

Involve operational staff in discussing their work and mapping processes.

To reach an “operational-control” situation.

Cost reduction programs, Digital Transformation, GDPR, Compliance/Certification, Outsourcing, Automation.



350+ Customers worldwide. Offices in NL and UK





Change Programme



Housing Applications Implementation



RPA, 1000 processes in 2yr


South Tyneside Council

Identifying efficiencies



HS2 Organisational Efficiency



People Driven Change



Process Improvement



Service Redesign & Cost Savings



New Housing Mngmnt System



Customer service improvement



Automation / RPA



Voids processes


wrexham
COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL
wrecsam

ASC redesign & digital change

MISSION: in line with key process management principles

(Lean, OpEx, WCM, TOC, 6Σ, Kaizen, etc.)



2. Customer Journey



3. Facts and Data



1. Team



4. Improvements



5. Continuous Improvement

Organisations see increasing number of projects

EFFECTIVENESS

Reduce lead times
First time right
eLearning /handbook
Outsourcing
Suppliers

EFFICIENCY

Cost reduction
Cheaper products
Inflationary costs
Do more with team

COMPLIANCE

Risk management
Privacy, GDPR
Meta Data
Certifications
Financial Control

TRANSFORMATION

Automation/ Legacy
Self Service
Service Redesign
Single Access Point
Data management

Central role for process management



The Engage Process commitment includes



**Dedicated Chapter in
Knowledge Center**



**Processes
Landing Pages
Business Cases**

**Support Creation of
“Standard” Reports
GDPR etc.**

**Local Open Training
days
(and in-house)**

Customer Day

Regional Meet Ups

**Product Consulting
(on site)**

**Special Discount
all Subscriptions**

**Participate in Task
Force(s) for New Laws &
Regulations (Partners)**

**Customers
Chat Group**

**Visit for
Process Management
Discussions**

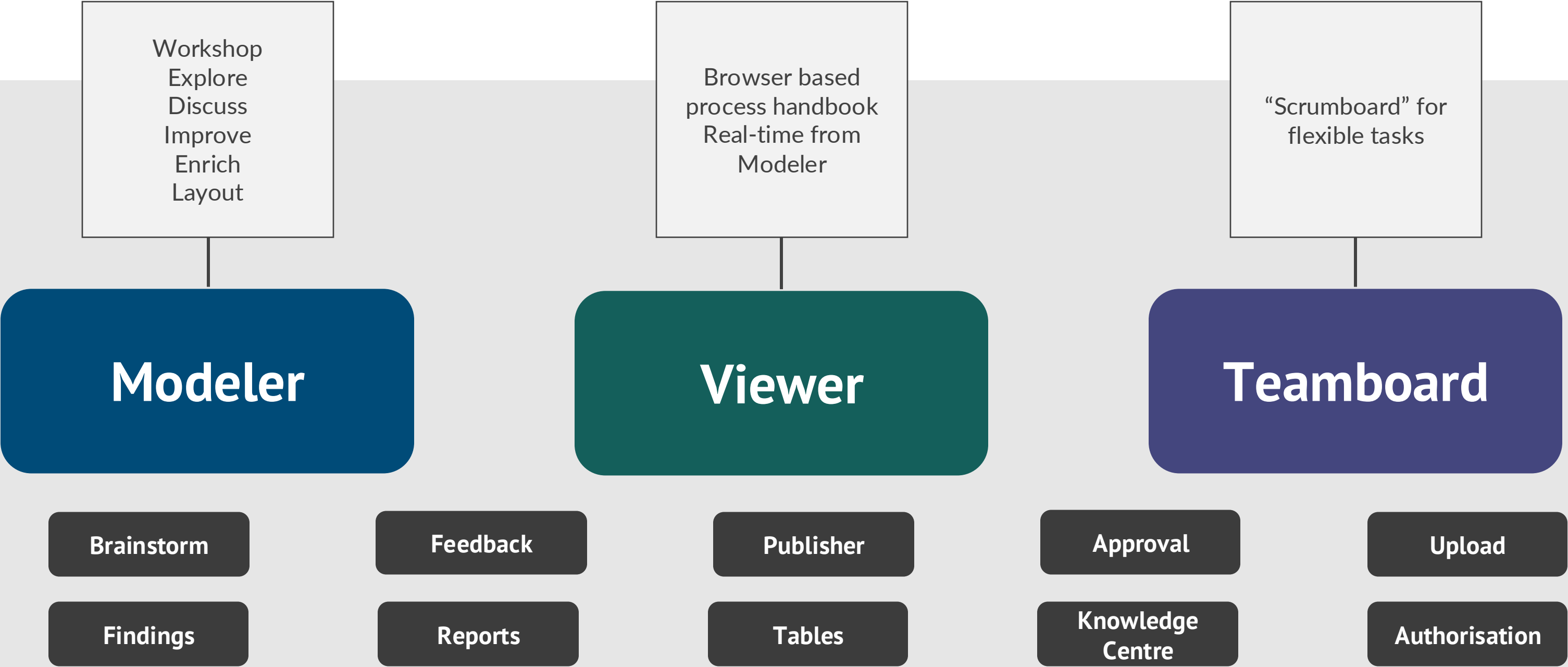
We will be in Wales!

DIGITAL TRANSFORMATION & RPA

WHERE DOES PROCESS MANAGEMENT FIT?

1. **Know the process** and relevant exceptions before you automate.
2. **Improve first.** Still or less needed? Shift priority to other (part of) process?
3. **Justification** for the project. AS/IS vs TO/BE.
4. **Central control** / overview of all new solutions (what, when, where, who etc).
5. **Stakeholder engagement.**
6. Include in **continuous improvement** by operational team
7. **Other aspects in perspective.** data, risk, bottlenecks, systems etc

Engage Process Platform



CONFIGURATIONS

Aligning functionality with organisation's goals



MODULES



Step Library



Tables



Users & Groups



Process Handbook
& Viewer



Analysis



Reports
& Export



Comments



Teamboard



Process Environment
& Landscape



Process Approval

YOUR GOALS & PROGRAMS

Cost Savings

Compliance / GDPR

Service Redesign

Certification

Automation / Robotics

Identity Access

Benefits Realisation

Handbook,
Knowledge Base

Merger / Outsourcing

Operational Excellence

PROCESS PLATFORM

Process handbook design

 Hyde

Process Operating Model



HOME

STRATEGY AND POSITIONING

CORE SERVICES

ENTERPRISE SUPPORT

Enterprise Support

Manage Finance

Manage Accounts Payable & Receivable

Manage Fixed Assets

Manage General Accounting

Manage Financial Risk

Manage Reporting

Manage Human Resources

Recruitment and Induction

Provide Business partner Support

Manage Pay role

Manage Employee Performance

Manage Learning & Development

Manage Employee Relations

Manage Risk & Compliance

Manage Audit

Manage Policy and Procedures

Manage Business Continuity Planning

Manage Operational Risk

Manage Reputational Risk

Manage Physical Infrastructure

Manage Facilities

Manage Corporate and Legal

Manage Corporate Governance

Manage Legal Services

Corporate Social Responsibility

Manage Vendors

Procure Goods and Services

Procure Goods and Services

Procure Goods and Services

Manage Awareness

Manage Internal Comms

Manage External Comms

Manage Corporate Comms and Reputation

Manage IT and Data Services

Manage IT Strategy

Manage Service Design

Manage and Support Change

Manage Operational Support

Manage Information

EngageProcess

Luton

Process Handbook

Home

Chief Executive

Children, Families and Education

Inclusive Economy

Population Wellbeing

Chief Executive

Children, Families and Education

Inclusive Economy

Population Wellbeing


Welcome to the digital process handbook of Luton Borough Council.

Click on a Directorate to navigate to their Service Areas.


Questions / Remarks?

Click [here](#) to send an email.

PROCESS

 NORTH YORKSHIRE COUNCIL

Process Handbook



Home

Chief Executive

Children and Young People's Service

Community Development

Corporate resources

Environment

Health and Adult Services

Chief Executive

Children and Young People's Service

Community Development

Corporate resources


Health and Adult Services

Environment


Questions / Remarks?

Click [here](#) to send an email.

EngageProcess

 AUA

Process Handbook



Home

CEO

Development & Technology

Finance & Accounting

General

Health, Safety & Sustainability

Human Resources

IAD

Operations

Revenue Development & Communications

CEO

Development & Technology

Finance & Accounting

General

Health, Safety & Sustainability

Human Resources

IAD

Operations

Revenue Development & Communications

Welcome to the process handbook of the Aruba Airport Authority!

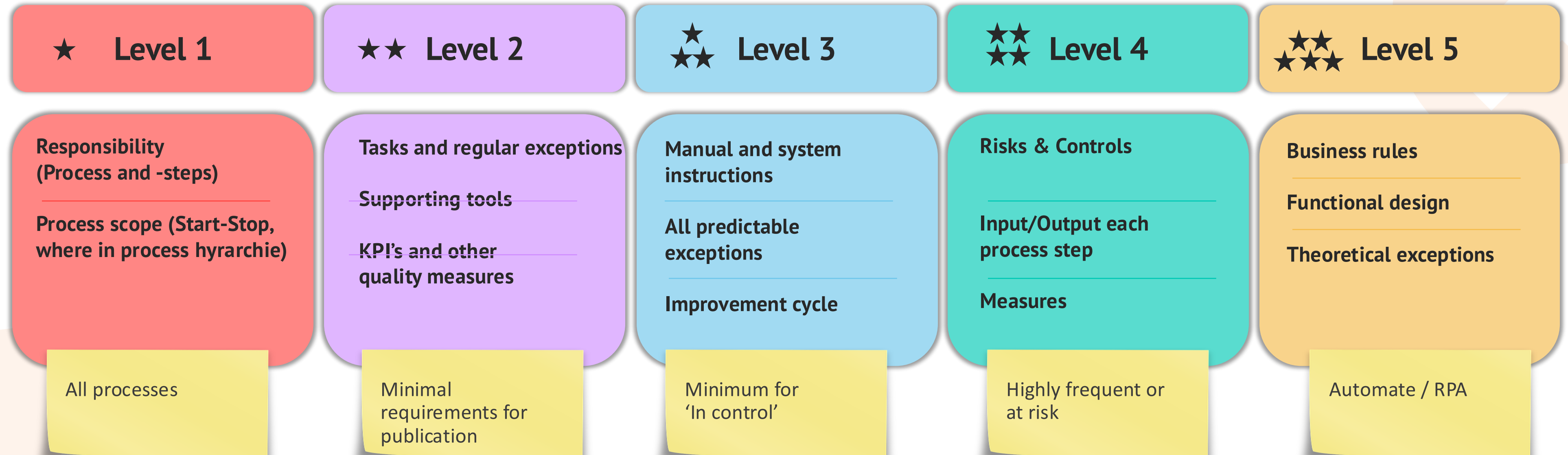
Click on a shape to navigate to their page or processes.

Questions / Remarks?

Click [here](#) to send an email.

EngageProcess

Maturity model



Example only

Your maturity model determined by situation, goals, timing, resources of your organisation.

RE-INTRODUCTIONS

On-site interactive discussion

Request via

winola@engageprocess.com

dean@engageprocess.com

andrew.sandford@weareleanandagile.com



Creating the right environment for change

Tim Daley

Strategy & Transformation Director

The background is a solid green color. On the left side, there is a series of white dots of varying sizes arranged in a curved, upward-sloping path. In the center, there is a large white circle. To the right of this circle, there is a thick white curved line that forms a partial circle, also curving upwards.

**Digital transformation?
Just transformation?
Change?**

“

Digital transformation goes beyond technology. It's designing services around the needs of your users, it's creating an organisation with the culture and skills for change to succeed.

It's about people.

”

The background is a solid green color. On the left side, there is a vertical line of white dots of varying sizes, arranged in a slightly curved pattern. In the center, there is a large white circle. To the right of this circle, there is a large white arc that forms a partial circle, also on the right side of the frame.

Digital in Wales:
Improving the lives
of everyone through
collaboration,
innovation and better
public services.

○● Overarching strategy



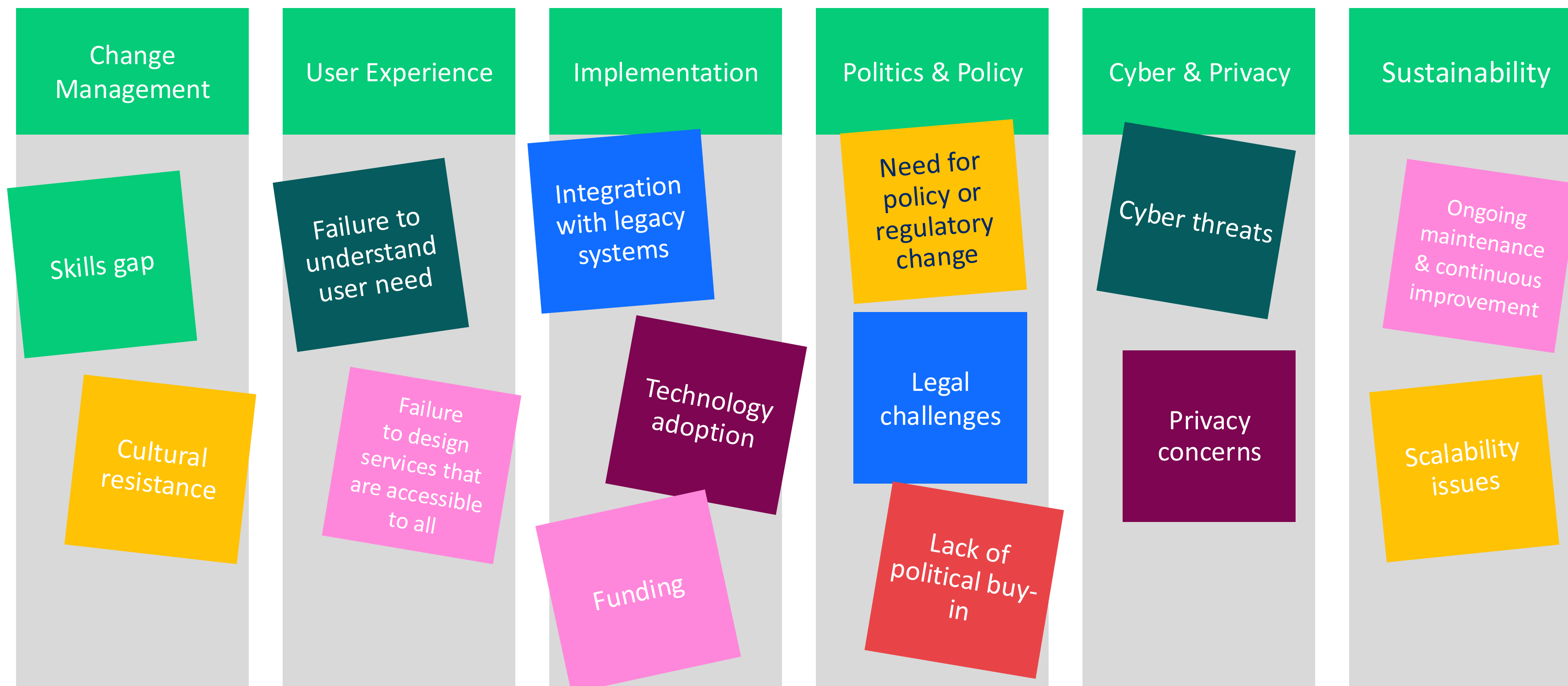
Supported by your change narrative

● The challenges: common

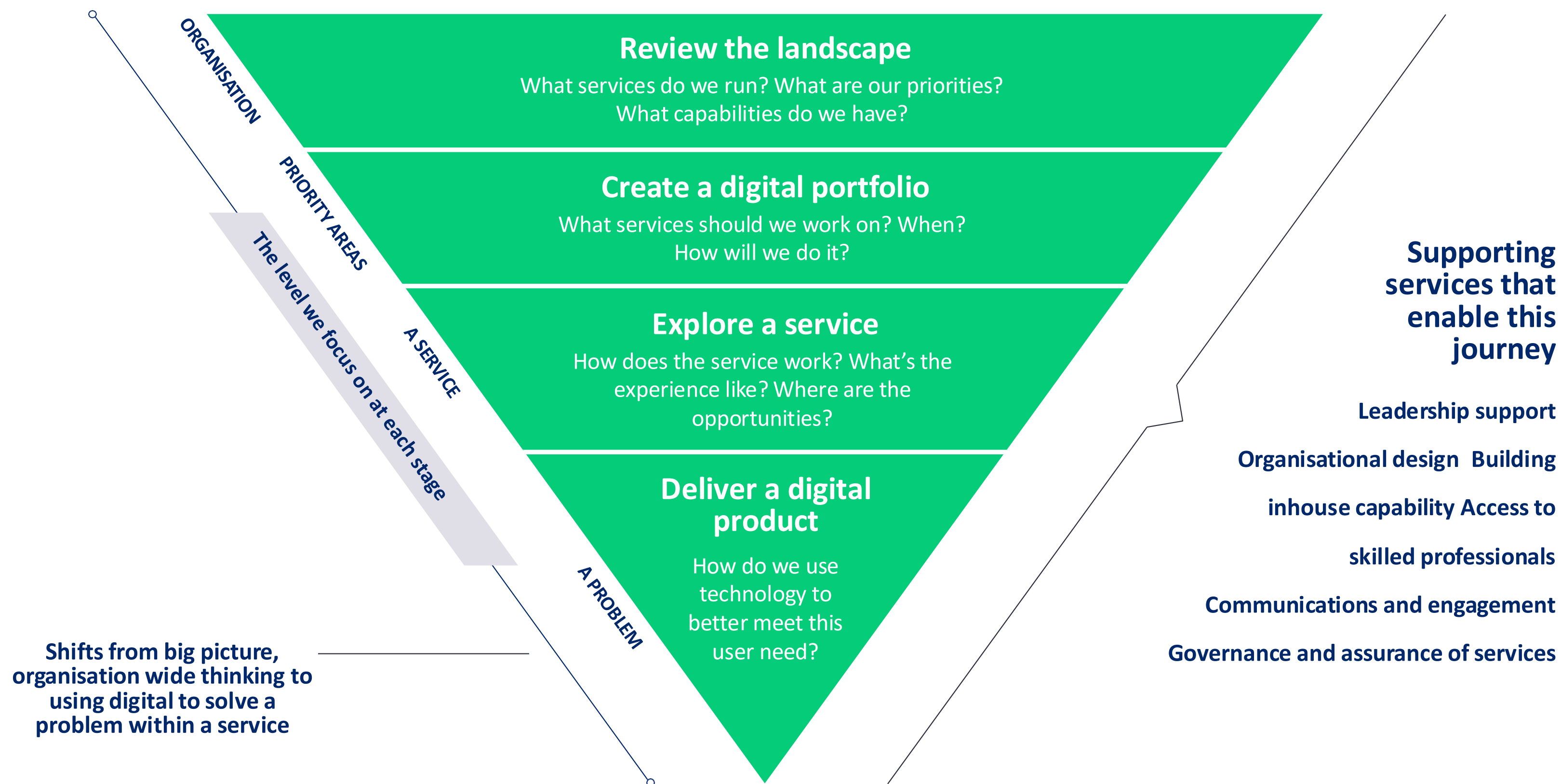
- Financial challenges
- Resident expectations
- Increased demand
- Shifting landscape



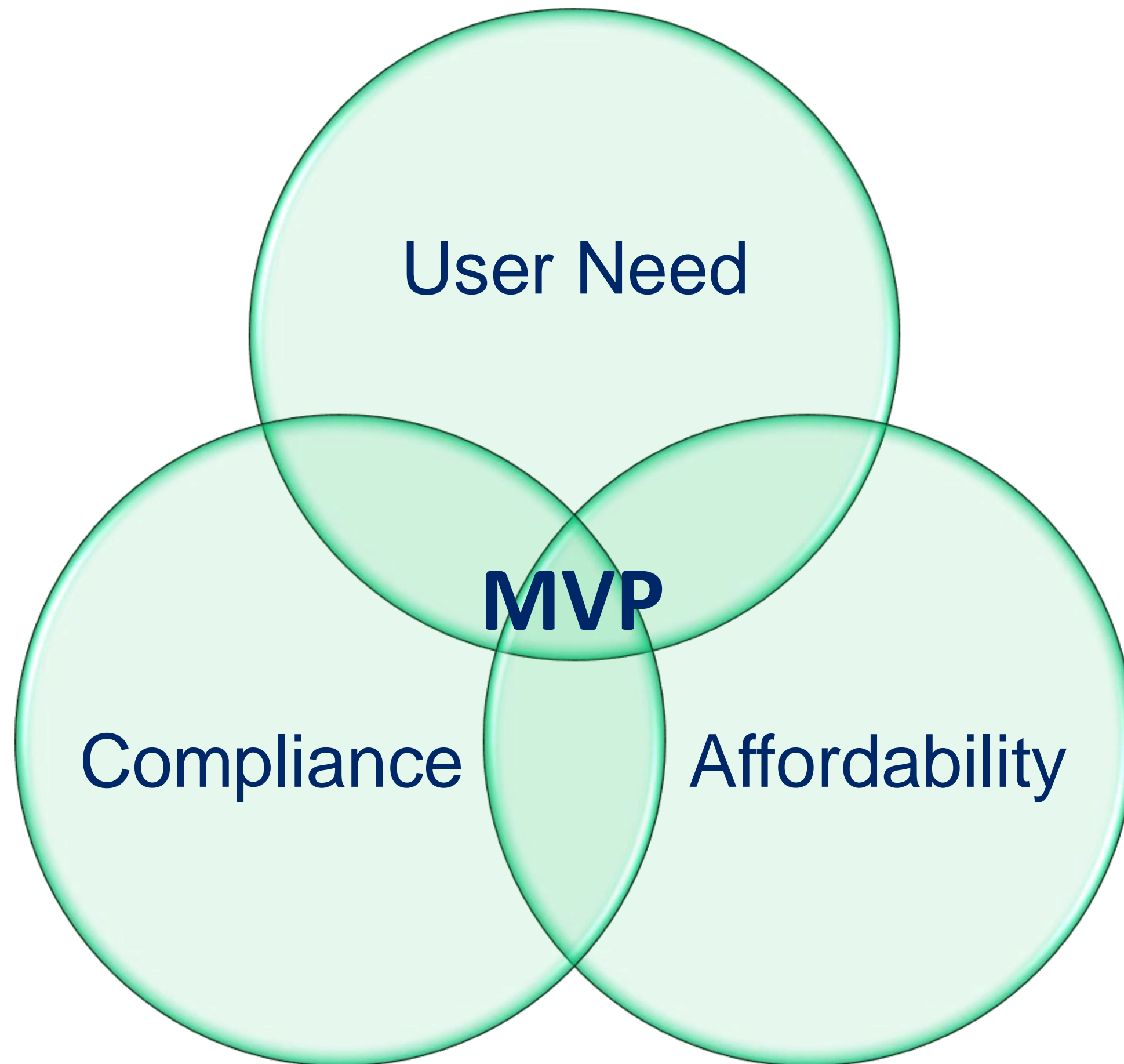
Strategic risks to transformation



Our approach to digital transformation

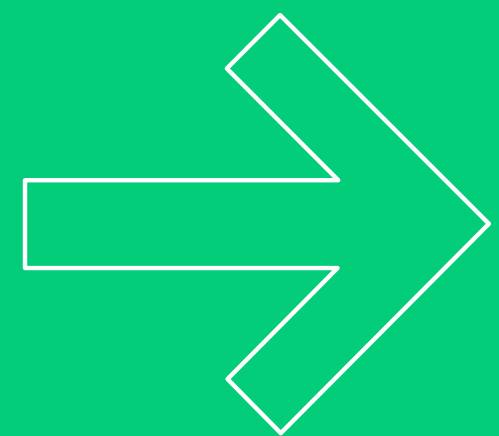


●● Balancing delivery, creating an MVP

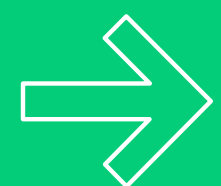
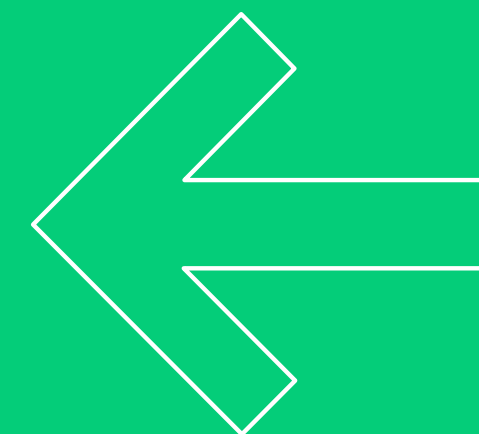


Impacts:

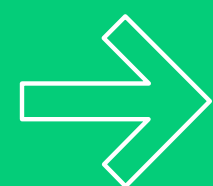
- Budget
- People
- Spend



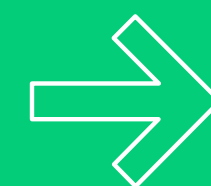
Ways to approach transformation



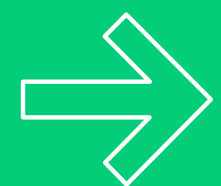
Stop



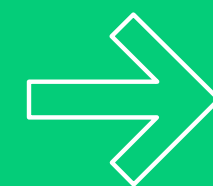
Do nothing



Reduce



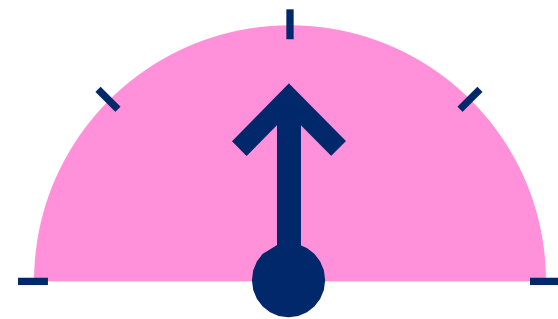
Collaboration & Partnership
(Alternative delivery models)



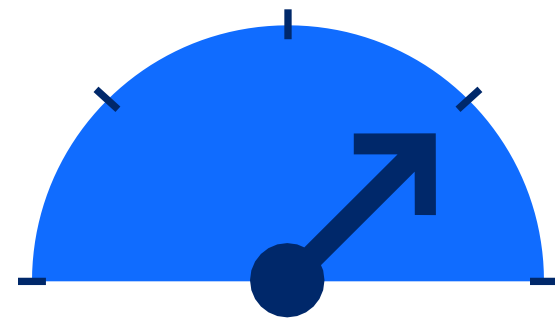
Improve

- Channel shift
- Processes
- Organisational design

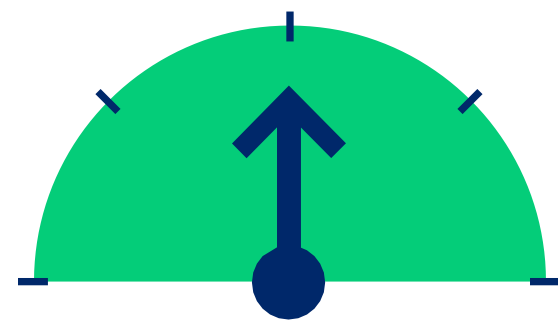
As is



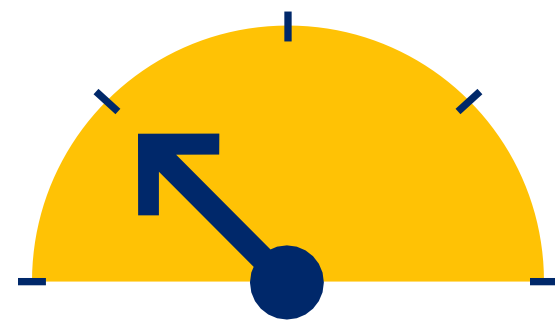
Face to
face



Paper

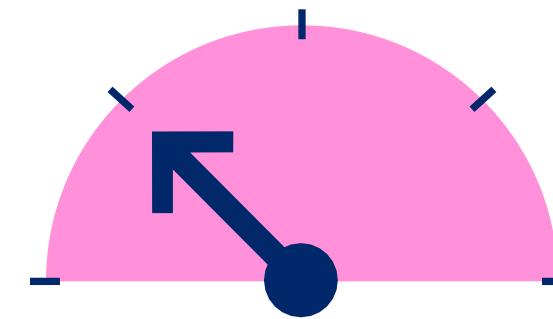


Phone

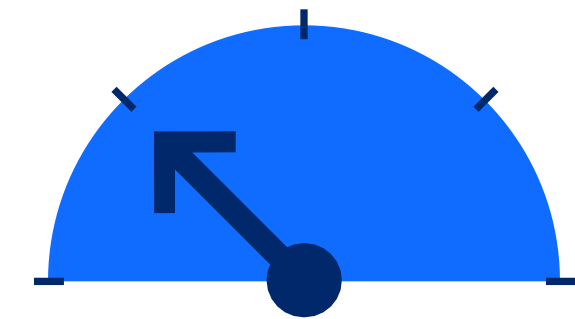


Online

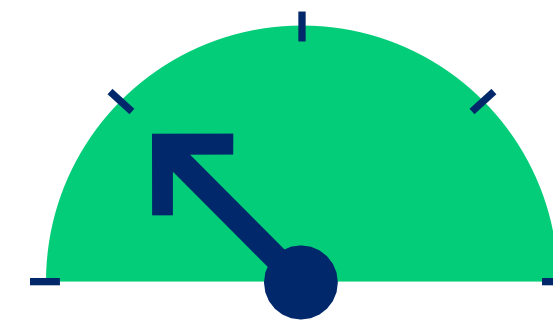
To be



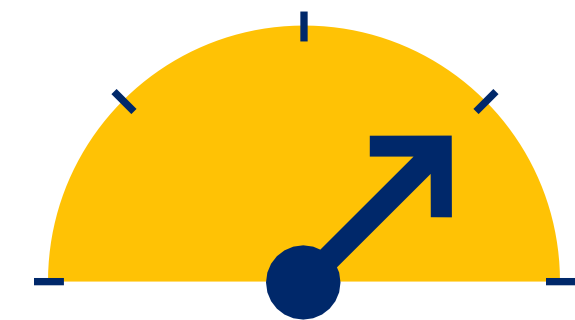
Face to
face



Paper



Phone

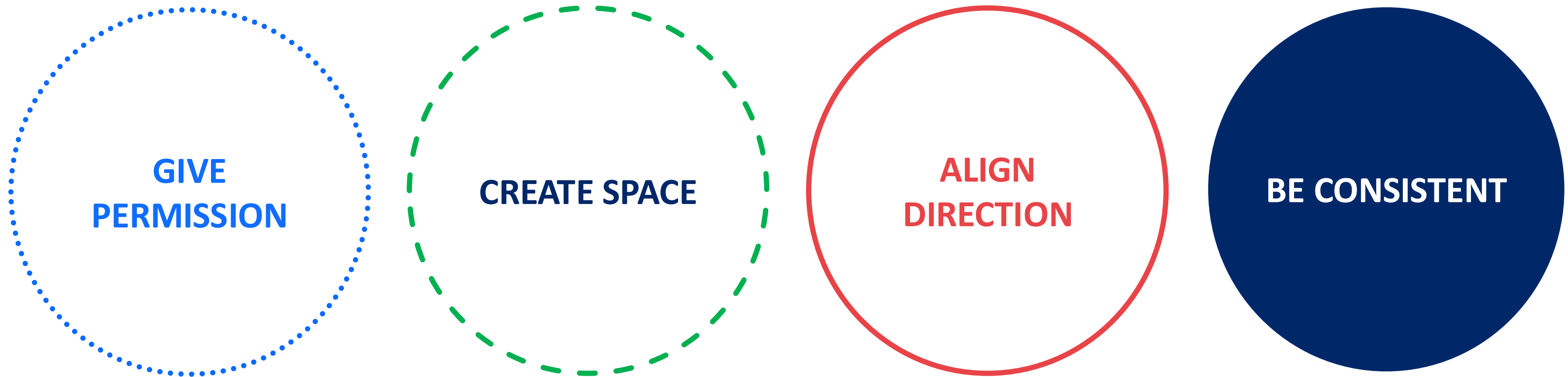


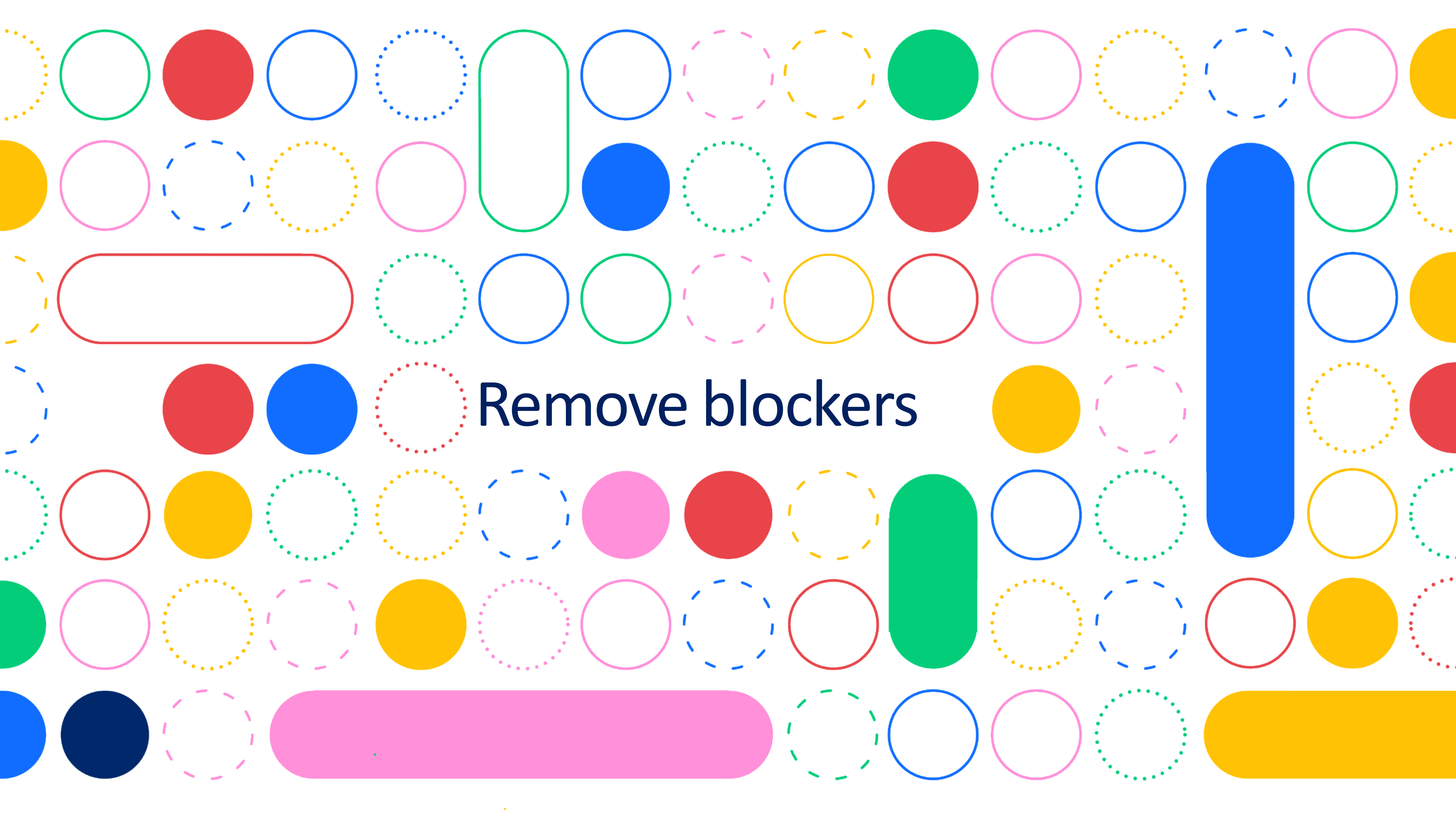
Online

Being user led



Leading service transformation

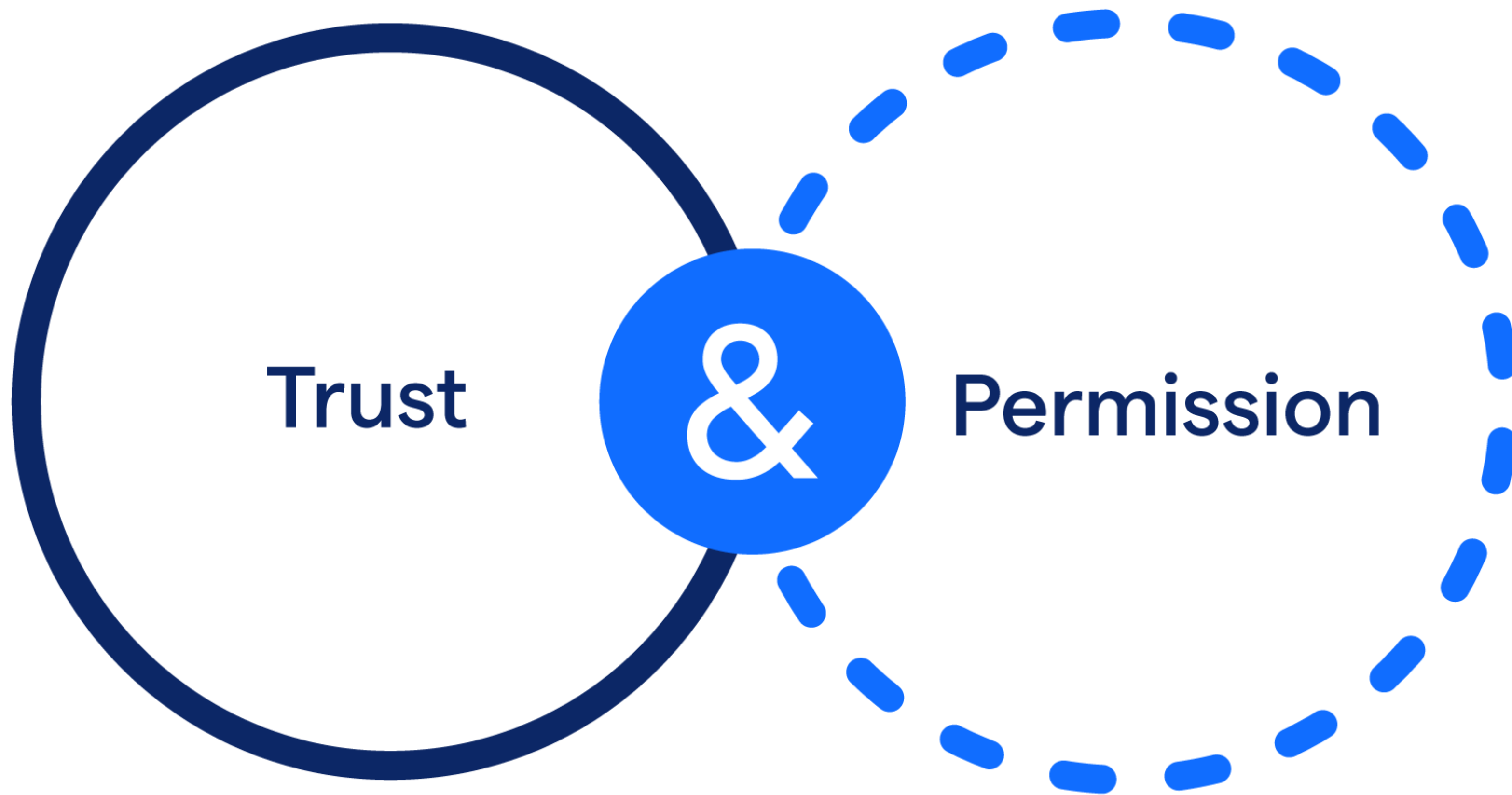




Remove blockers



Organisational culture





Supportive?

Innovative?

Challenge?

Sharing?

Embracing failure?

Inclusive?

Transparent?

Collaboration?

Risk appetite?

Open?



**Communicating
change and
creating a culture
for success**

●● An overarching narrative

- Words are important – need collective understanding not individual agreement
- Narratives can flex and change, and will
- Can form the basis of your next steps when kicking off a new transformation
- Using now next later helps prioritise without constraints

Working with your political leadership

→ Aligning purpose

→ Governance

→ Motivations

→ Transparency

→ Trust

→ Engagement

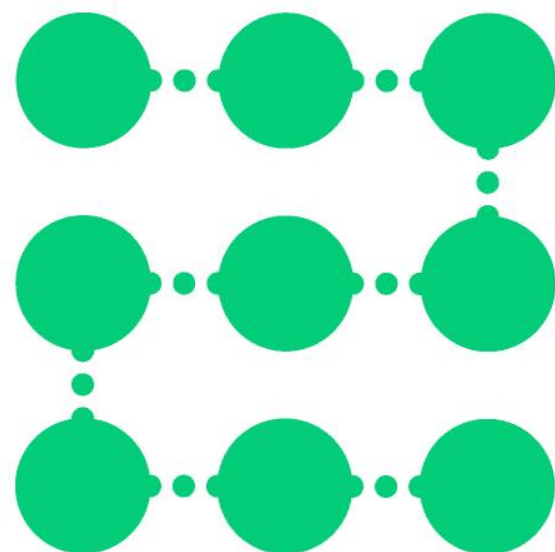


Building a Service Catalogue

Caerphilly County Borough Council
Karen Williams
Customer Services Manager

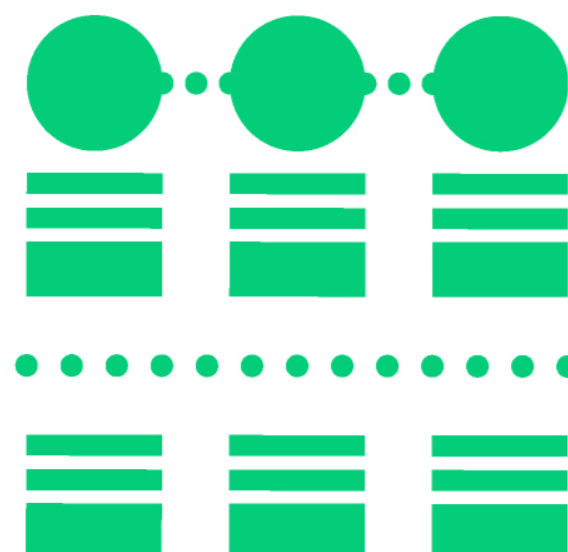
Background

- Early summer 2023, we embarked on our MTC journey
- Save £45 million in 3 years
- Didn't have a definitive list of our services
- Didn't know our processes
- Didn't know our customers



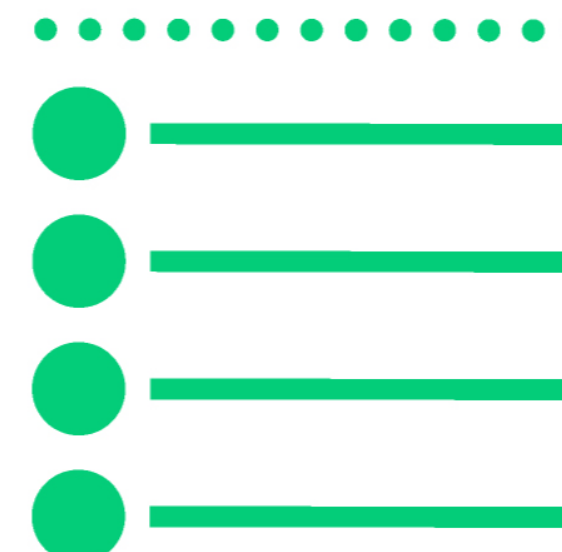
User Journey

User journey mapping and personas to visualise interactions from our customers' perspective, to give us a better understanding of their needs, feelings and pain points. Customer engagement.



Process Mapping

Process maps illustrate the customer experience and business processes. Including technology used, cost of delivery and time.

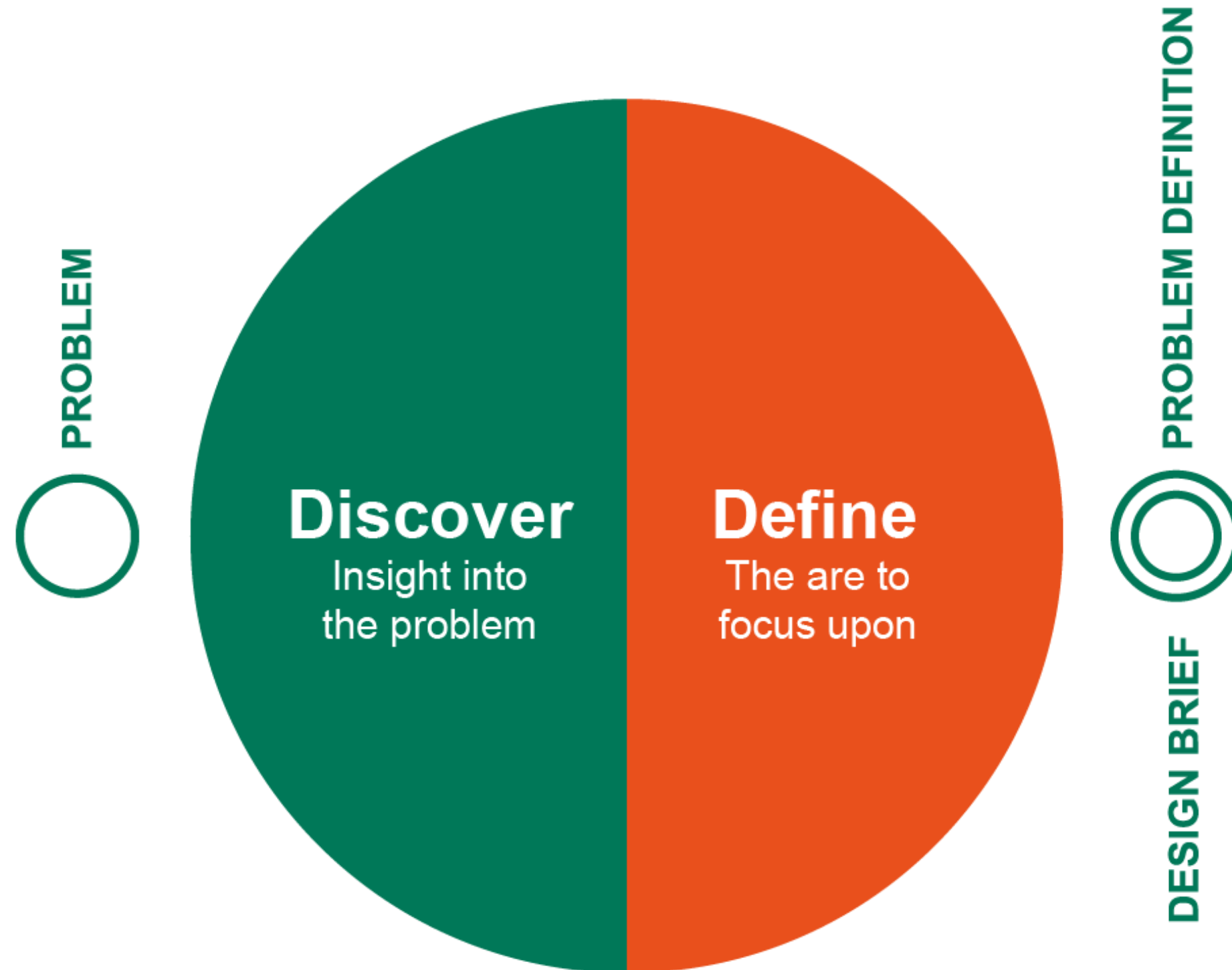


Service Catalogue

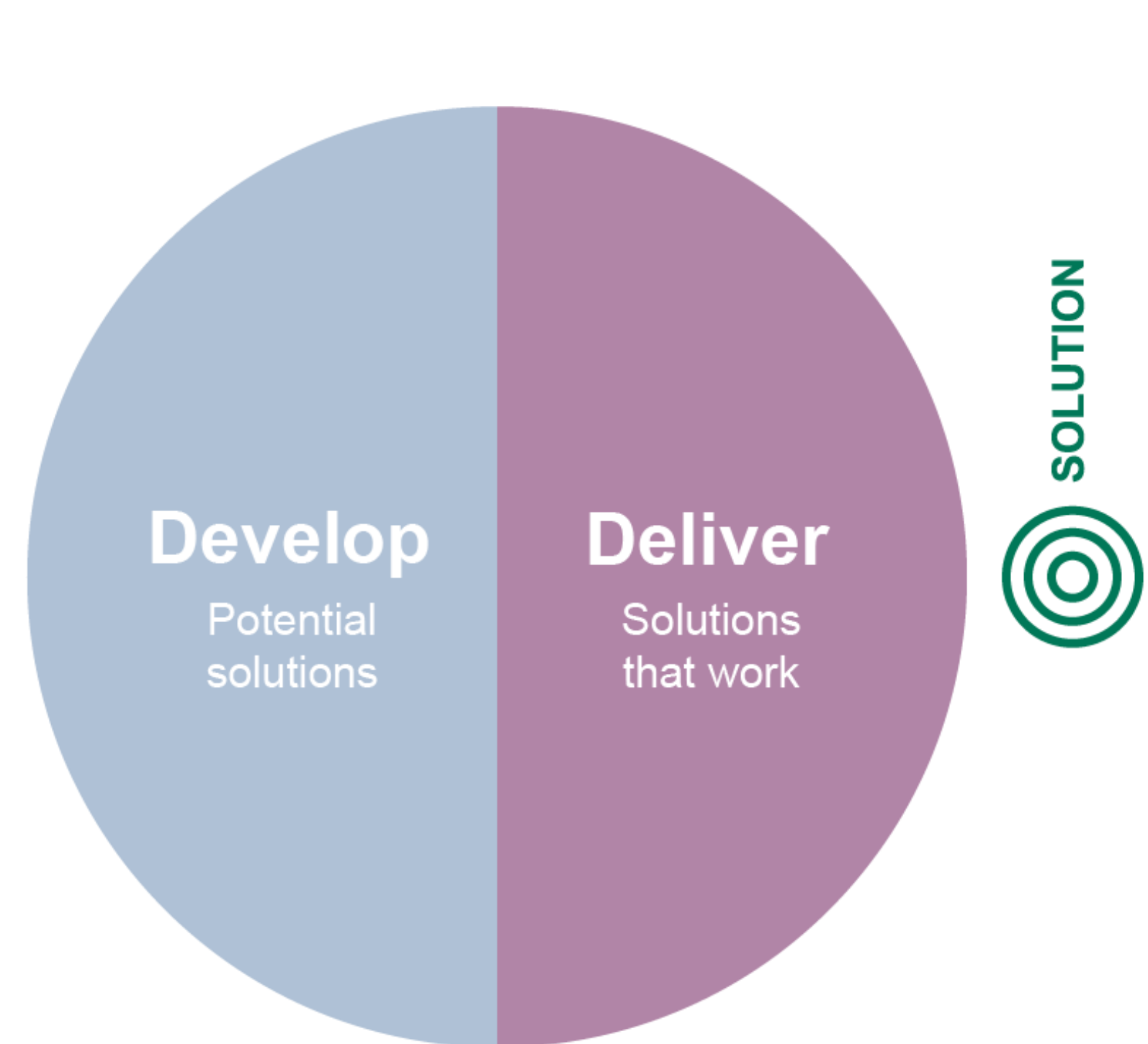
An accurate list of services delivered by the authority. Recording who owns the service.

The design process

WHAT'S THE PROBLEM?



WHAT'S THE SOLUTION?



A person's hands are shown holding a smartphone and a credit card over a laptop keyboard. The image is overlaid with a semi-transparent yellow filter. The text 'Service Redesign: Council Tax' is written in white, bold, sans-serif font across the center of the image.

Service Redesign: Council Tax

Discover – Council Tax

What we did:

BASELINE OVERVIEW

- £9.6m in council tax arrears.
- £150k postage costs.
- DD payers 70% /Non DD Payers 30%.
- Over 150,000 bills, adjustments and notices issued.
- 40,000 emails.
- 95,000 phone calls.
- 11,000 council tax accounts in arrears.



CUSTOMER ENGAGEMENT

- Online form to x80 customers who have recently interacted around Council Tax.
- Service safari at Newbridge Leisure Centre.
- Direct calls with customers.

PEER –TO– PEER REVIEW

- Spoke to other x5 other local authorities to gain a better insight in to the processes and benchmark our position.

Discover – Council Tax

What we did:

STAFF ENGAGEMENT

- Spoke to all Council Tax staff to gain a back stage insight of the processes and feelings when dealing with citizens and systems.

USER PERSONAS

- Created user personas to assess customer journeys across the service.

IT/SOFTWARE AUDIT

- We looked at and audited the IT and software infrastructure in place to deliver and fulfil citizen's Council Tax queries and payments.

Define – Council Tax


What we did:

KEY THEMES

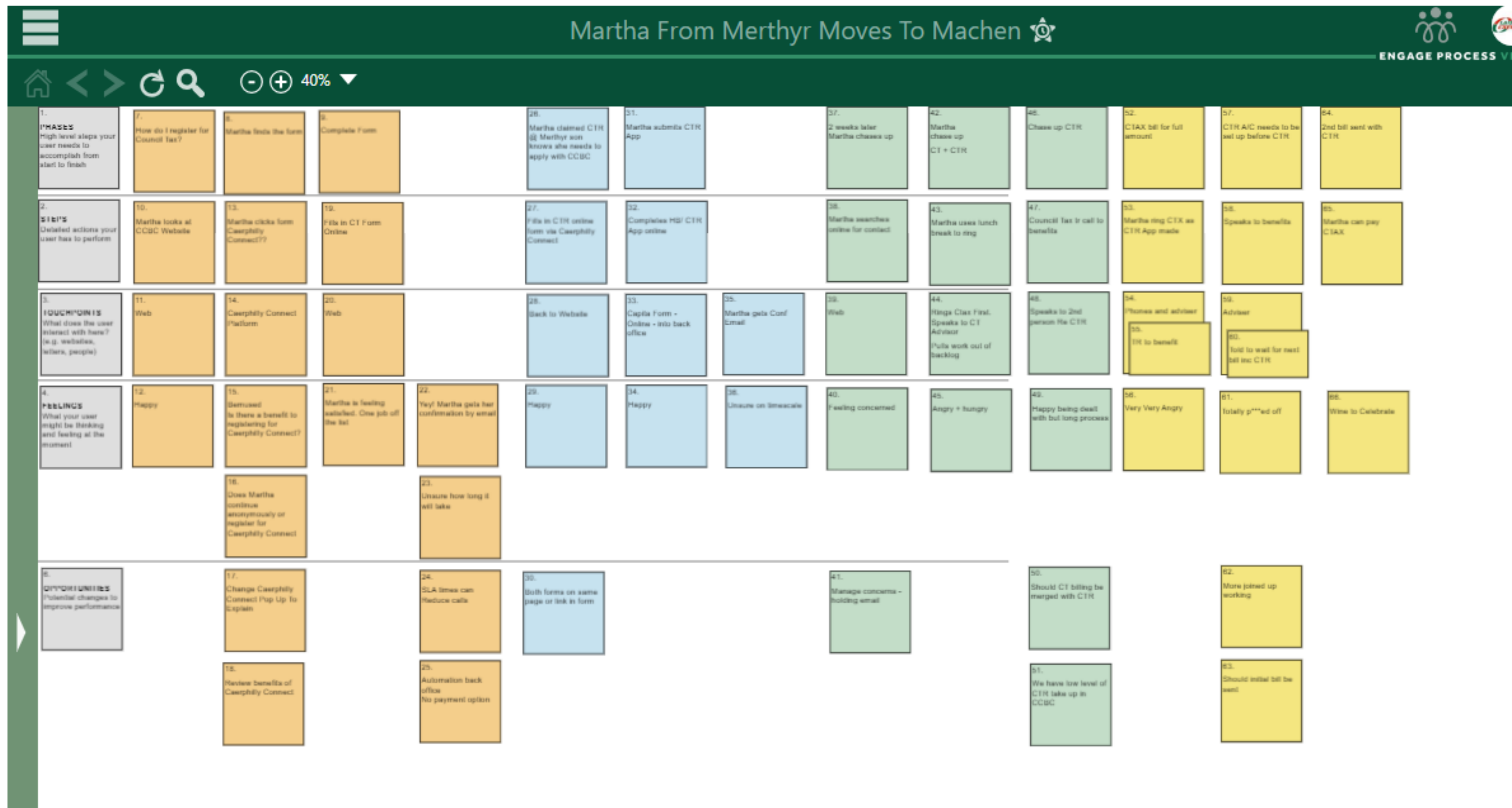
- No online method for setting up a direct debit for Council Tax.
- Bad user experience.
- Repeat conversations and interactions.
- Customers engaging with multiple staff across different service lines.
- Leniency around debt arrears repayment.
- Reduced call handling hours to cater for demand (backlog).
- The sending out of paper bills is a time – consuming and costly process (bills/reminders/notices etc).



Customer personas



Customer Personas		
Add		
Name	Description	
Robert Rees	Robert is a single man aged 40 living in Risca. He works full time. He prefers to phone rather than go online as digital skills are not good. He cares about the environment and recycles as much as he can	Delete
Martha Williams	is moving from Merthyr to Machen. She is digitally enabled and likes to do things online. She is a single woman working full time on low income. Her work pattern means she cannot always get to the phone in office hours. She is a bit of a worrier	
John James	John is 35 years old and lives in Pontypridd. He owns his own home. He is single and is digitally enabled. He is in full time employment. He is confident and likes things to be done promptly	Delete
Bill and Jane Smith	Bill and Jane Smith live in Rhymney. Contract holder CCBC. Married with 2 children. Both work. Prefers to speak with a person on phone although has good digital skills. Looks after property and sees the house as his home	Delete
Betty Evans	Betty is 20 years old. Betty lives in Caerphilly. Betty is a full time student and uses the library regularly to borrow books and use the library PCs.	Delete
Betty Evans	Betty is 20 years old. Betty lives in Bargoed and is a full time student in a University. Betty lives at home with her parents. She is very active and enjoys keeping fit	Delete
Mr & Mrs Jones	They live in Oakdale. They are expecting their first child. They wish to extend their house and make it bigger. They have good digital skills and prefer to engage with services online.	Delete



Define – Council Tax

Our focus

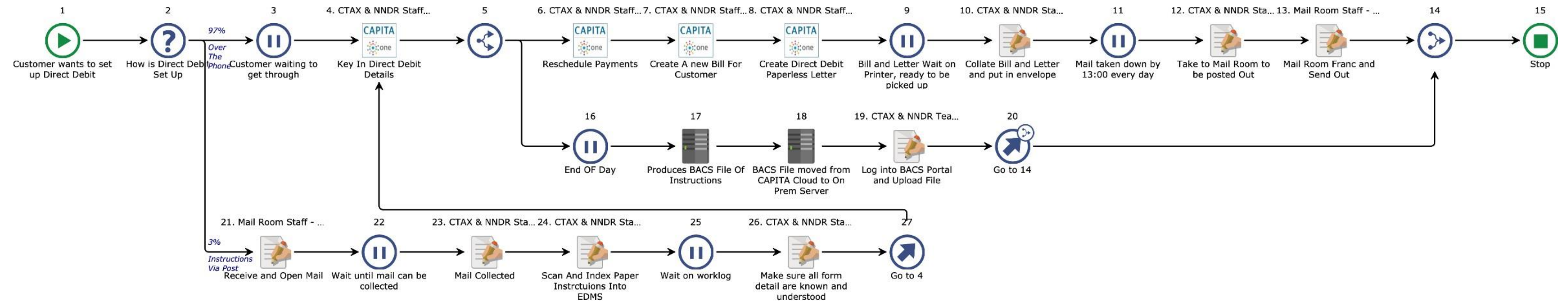
→ 20–25% of residents generate the largest proportion of repeat demand, due to the leniency and lack of support around debt.

→ The council tax payment and interaction journey needs improvement at multiple points. The process in place is generating the demand.

→ The relationship between Capita and CCBC has not been explored to its full potential to benefit the council tax process.

Define – Council Tax As Is

Process Map Setting up a Direct Debit:



USER ENTRY POINTS

1/ Over the phone (97%)

2/ Via Post (3%)

Develop – Council Tax

Ideas

PROTOTYPE 1:
CAPITA DEPLOYMENT
OF DD FORM

Deliver – Council Tax

We delivered:

DIRECT DEBIT ONLINE

BENEFITS

- Reduced phone calls.
- No keying of data – significantly reduces handling back-end for CCBC staff, along with reducing errors.
- Improved customer experience.

Increased uptake from 69% → 73%
(Feb 24) (June 24)

66% of Direct Debit set up were
done online (just over 3600)



Service Catalogue





Service Catalogue

- Home
- Services
- Customer Personas
- Customer Journeys
- Business Processes
- Opportunities
- Benefits Realised

Services

Filter On Name Containing - Apply

Add

Directorate	Service Area	Area Of Service	Name	   
Economy and Environment	Infrastructure	Highway Engineering	Alley gating	<button>Select</button>
		Highway Engineering	Bridge strengthening	<button>Select</button>
		Highway Engineering	Dropped kerbs	<button>Select</button>
		Highway Engineering	Flood prevention	<button>Select</button>
		Highway Engineering	Pavement parking	<button>Select</button>
		Highway Engineering	Public rights of way	<button>Select</button>
		Highway Engineering	Rights of way enforcement	<button>Select</button>
		Highway Engineering	Road bridges	<button>Select</button>
		Highway Engineering	Road safety cameras	<button>Select</button>
		Highway Engineering	Roads weight limits	<button>Select</button>
		Highway Engineering	Safety of disused mines and tins	<button>Select</button>

Service Catalogue

	<div>Customer Journeys (1)</div> <div>Business Process (1)</div> <div>Opportunities (1)</div>
on as	<div>Benefits Realised (1)</div>
neys	<h3>Service Type</h3> <div>External</div>
esses	<h3>Transaction</h3> <div>Primary</div> <div>Pay for something</div> <div>Secondary</div> <div>Please select</div>
ed	<h3>Provision Type</h3> <div>Statutory</div>
	<h3>Owner Of Service</h3> <div>Education and Corporate Services - Financial Services - Council Tax</div>
	<h3>Channel(s) Through Which Full Service Can Be Accessed</h3> <div><div><input type="checkbox"/> Face to Face (With Service Area)</div><div><input type="checkbox"/> Face to Face (With Customer Services)</div><div><input checked="" type="checkbox"/> Telephone (With Service Area)</div><div><input checked="" type="checkbox"/> Telephone (With Customer Services)</div><div><input type="checkbox"/> Microsite (i.e. Different website to the Corporate Website))</div><div><input checked="" type="checkbox"/> Corporate Website</div><div><input type="checkbox"/> Email</div></div>

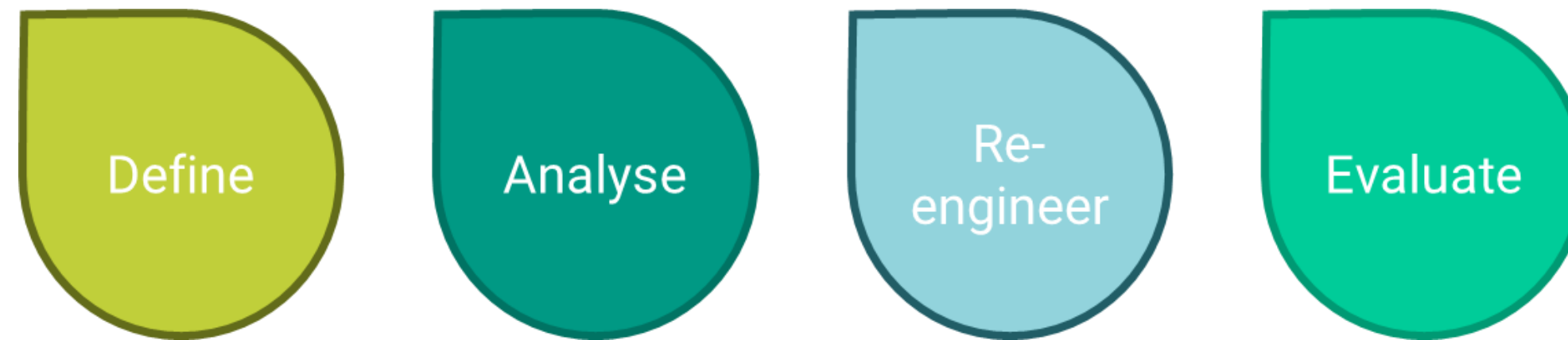


Any Questions?



Break

Visioning: Options Capture & Appraisal



DARE To Transform

Nicola Ratcliffe

Customer & Digital Delivery Lead

Torfaen Council

Agenda

Intro to Torfaen

Our Service Design Methodology

Our Approach to Visioning

Breakout Session

Summary

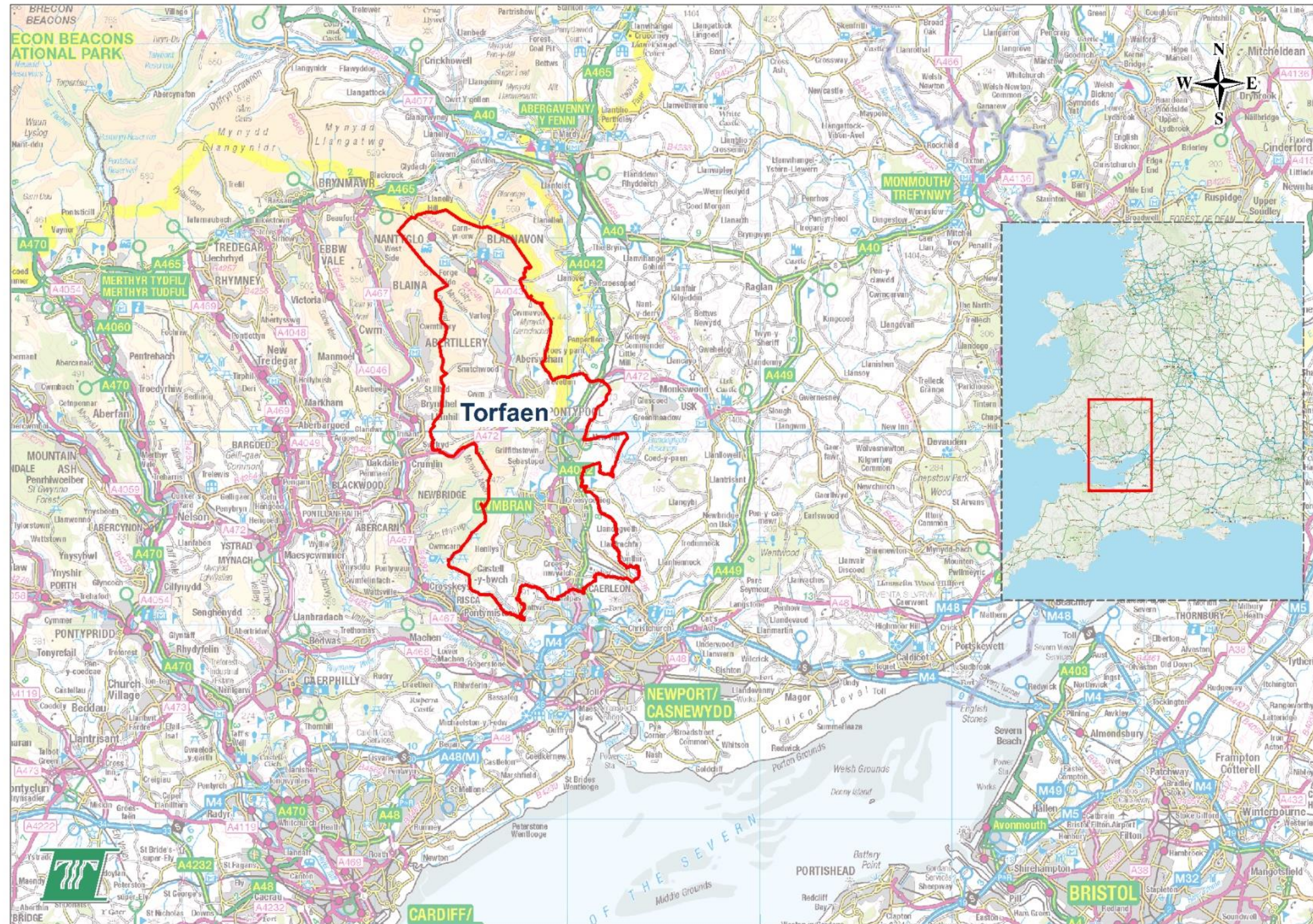


Tor... who?

South East Wales

Tourism highlights:

- Blaenavon Ironworks a UNESCO World Heritage Site 2000
- Big Pit National Coal Museum



Torfaen – Key Stats

Population of
92,300

3rd smallest in
Wales - covering an
area of 126 km²

3rd highest
population per km²
in Wales - 734
people per km²

3 main settlements
– Blaenavon,
Cwmbran &
Pontypool

Most deprived and
least deprived in
Wales – living very
close together

Higher percentage
of people claiming
benefits than the
whole of Wales

Higher percentage
of under 16s than
the whole of Wales

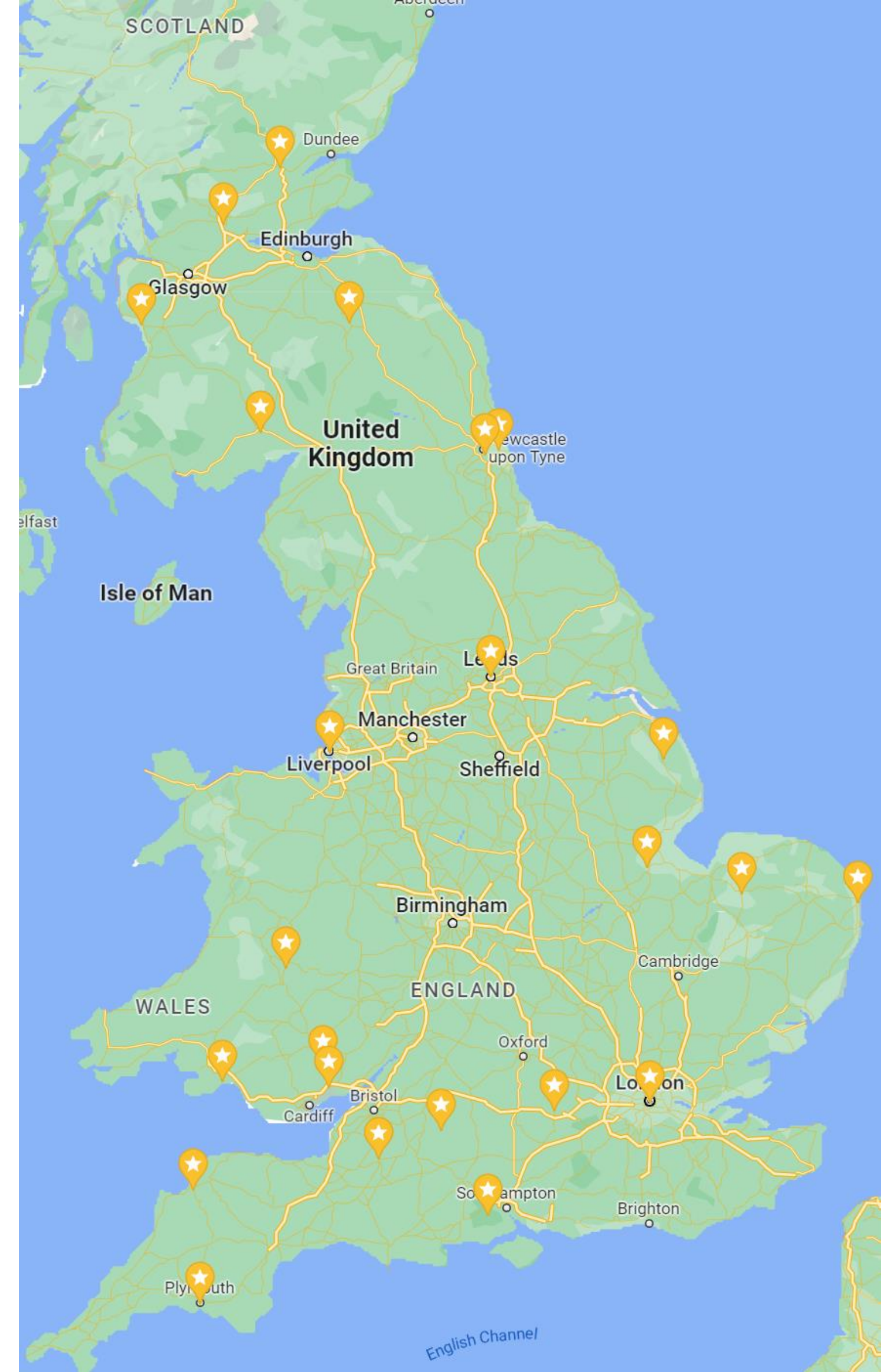
DARE to Transform

Service Design Methodology



Origins of DARE to Transform

- Developed and refined over a number of years
- Experiences from local authorities, housing associations, government departments/bodies
- Average savings of 61% identified
- Embedded Engage Process
- Developed bespoke training to complement approach

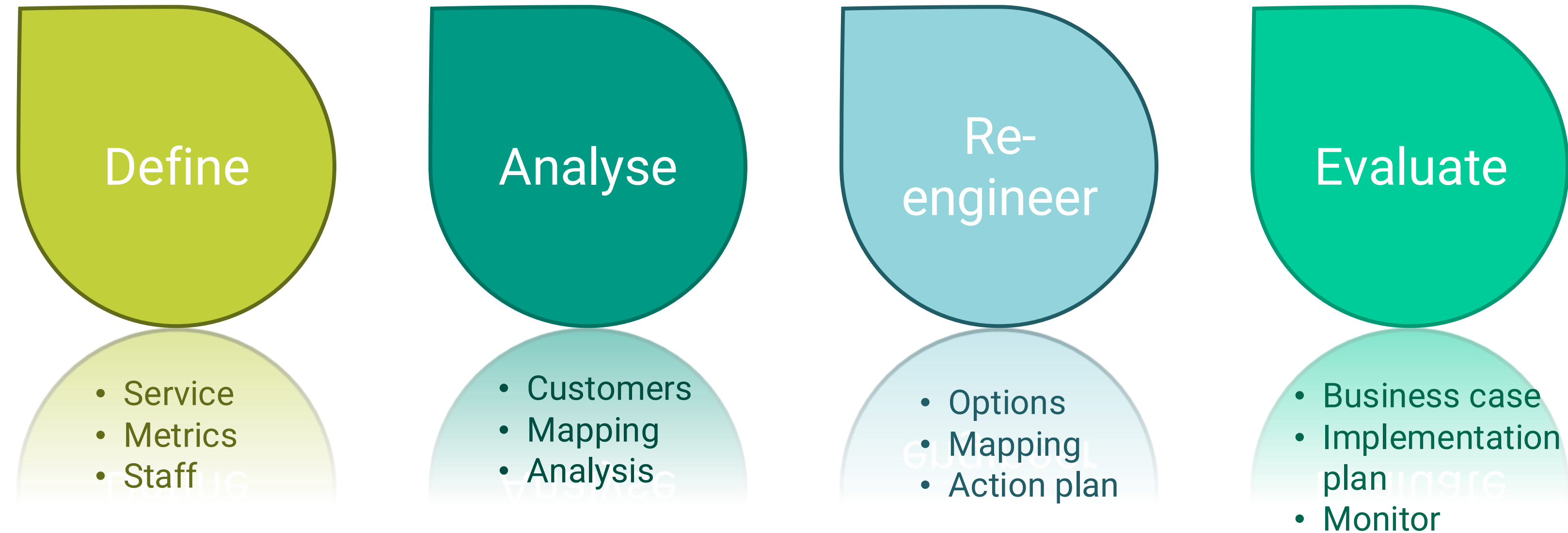


Service Areas Reviewed



Cemeteries	Complaints & FOI	Cost of living support	Countryside	Customer journeys	Customer services
Drainage	Fleet	GDPR	Grounds maintenance	Highways & streetlighting	Highways development control
Highways Enforcement	Homelessness	Housing allocations	Landfill & disposal	Members Enquiries	Parking
Parks & cemeteries	Passenger transport	Planning applications	Property	Revenues & benefits	Social care
Sports bookings	Street cleansing	Streetworks	Traffic Regulation	Waste & recycling	And more besides

DARE to Transform



Service Design Methodology

DARE to Transform – Our Objectives



Cashable savings



Maintain service
delivery after cuts



Time/efficiency savings



Service improvements



Reorganisation



Engage Support For DARE to Transform



Define

Admin Centre - create users & authorisations

Teamboard - project design & planning

Analyse

Modeller - mapping customer journey & processes

Modeller – data collection

Viewer - sharing & commenting

Re-engineer

Teamboard - visioning

Modeller - mapping customer journey & processes

Viewer - sharing & commenting

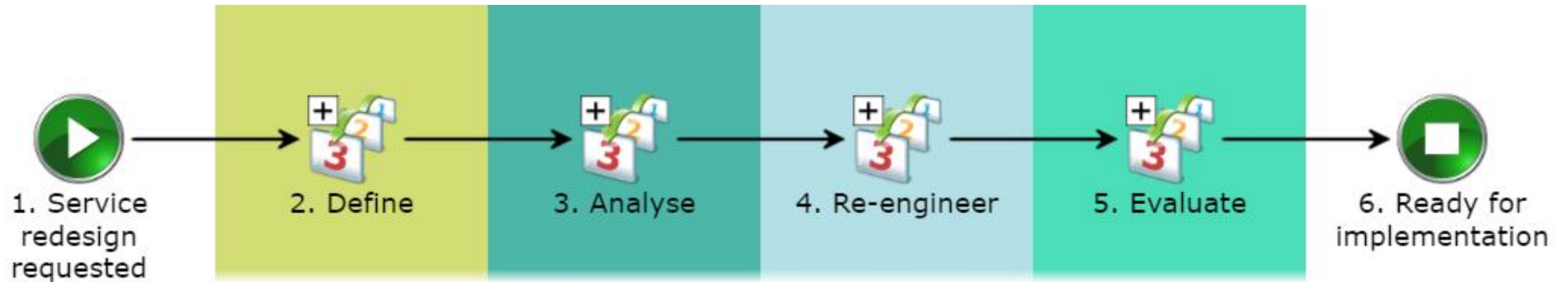
Evaluate

Modeller - process analytics & comparisons

Modeller - reporting

Publisher - sharing final versions

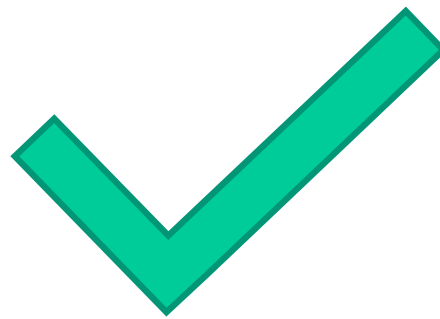
DARE to Transform



Visioning



Blue sky thinking – no barriers

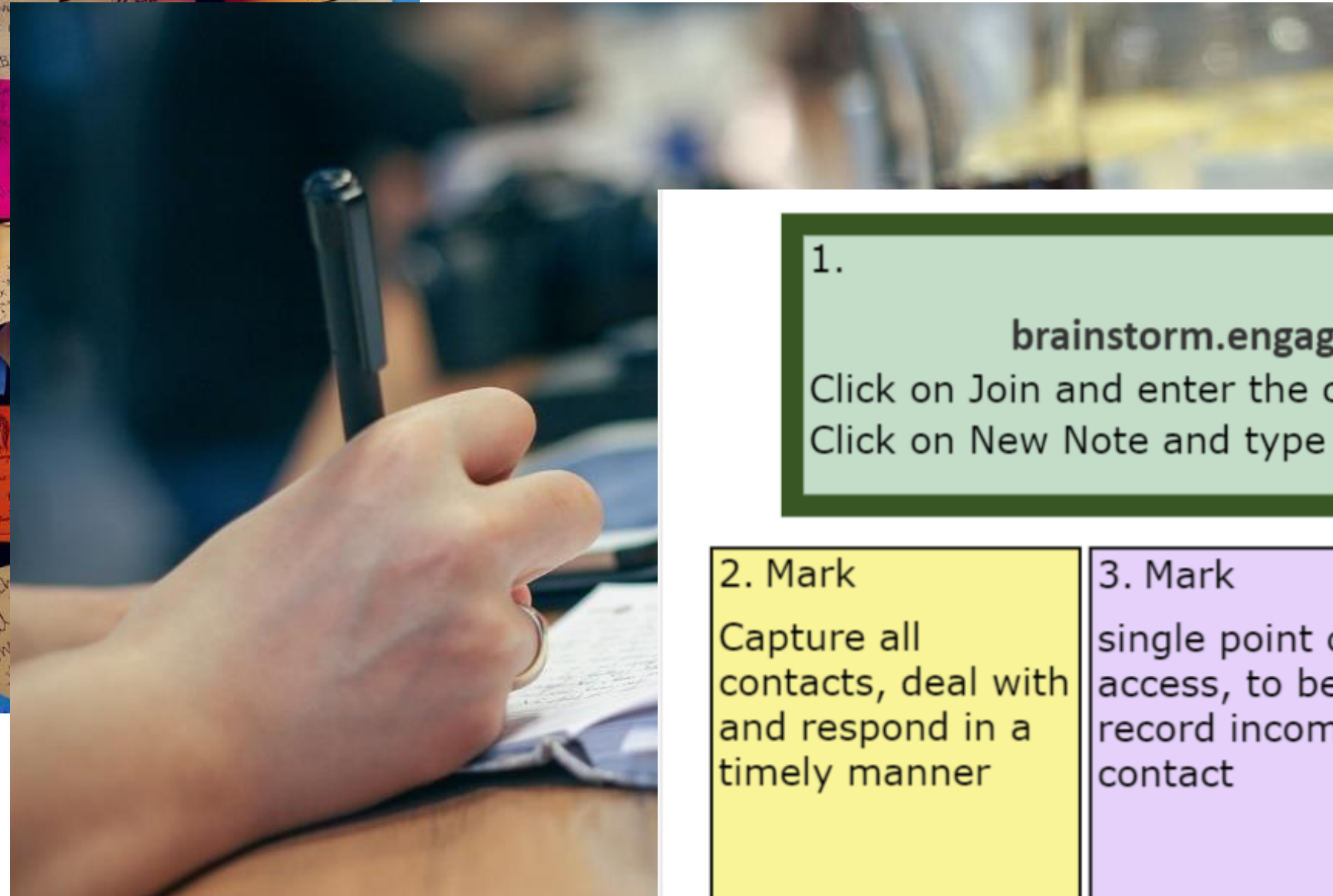


Capture all suggestions



Consider impact on customers, staff, management,
ease of implementation



[illegible]

brainstorm.engageprocess.com

2. Mark Capture all contacts, deal with and respond in a timely manner	3. Mark single point of access, to better record incoming contact	5. Michele Standard responses	7. Michele Standard process for all
4. Michele Improved information on website	8. Michele Comprehensive responses to lesson further correspondence.	9. Michele Web based application process	6. Michele New system for monitoring responses

Identify & Analyse Opportunities

Use TeamBoard to gather and analyse opportunities

Theme	Opportunity	Customer Impact	Staff Impact	Ease of Implementation
Communications	Acknowledge each logged request (unless requested not to)	<div><div></div>High</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Communications	Improve knowledge of members, residents and staff about the team	<div><div></div>High</div>	<div><div></div>Medium</div>	<div><div></div>Easy</div>
Communications	Improved information available on the web site to explain the process	<div><div></div>High</div>	<div><div></div>Medium</div>	<div><div></div>Easy</div>
Communications	Keep customers informed of the decision making process	<div><div></div>High</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Communications	Set up a tree land owner forum to take a joined up approach	<div><div></div>Low</div>	<div><div></div>Medium</div>	<div><div></div>Easy</div>
Communications	Single point and approach to reporting tree issues	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Forms & workflow	Allow customers to attach photos to support their request	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Some Effort</div>
Forms & workflow	Allow people to choose how to pinpoint the location - pin or address	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Forms & workflow	Create a new version of the form with questions that relate to the new process	<div><div></div>High</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Forms & workflow	Provide copy maps to customers for land ownership	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Some Effort</div>
Policy	Create a customer version of the policy that is easily accessible	<div><div></div>Medium</div>	<div><div></div>Medium</div>	<div><div></div>Some Effort</div>
Policy	Ensure that the tree team are fully aware of the requirements	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Some Effort</div>
Policy	Keep staff up to date on policy	<div><div></div>Medium</div>	<div><div></div>High</div>	<div><div></div>Some Effort</div>
Policy	Provide a copy of the customer version of the policy when requested	<div><div></div>High</div>	<div><div></div>High</div>	<div><div></div>Easy</div>
Resourcing	Additional resources to provide a proactive service	<div><div></div>Low</div>	<div><div></div>High</div>	<div><div></div>Some Effort</div>
Resourcing	Identify additional equipment required to enable the team to work	<div><div></div>Low</div>	<div><div></div>Very High</div>	<div><div></div>Some Effort</div>
Resourcing	Identify any equipment that needs to be updated or replaced	<div><div></div>Low</div>	<div><div></div>Very High</div>	<div><div></div>Some Effort</div>

Visioning – Share Your Knowledge

1. How have you captured opportunities, what have you tried and what works best for you?
2. How do you analyse opportunities and determine what you can do and what might give the biggest bang for the bucks?

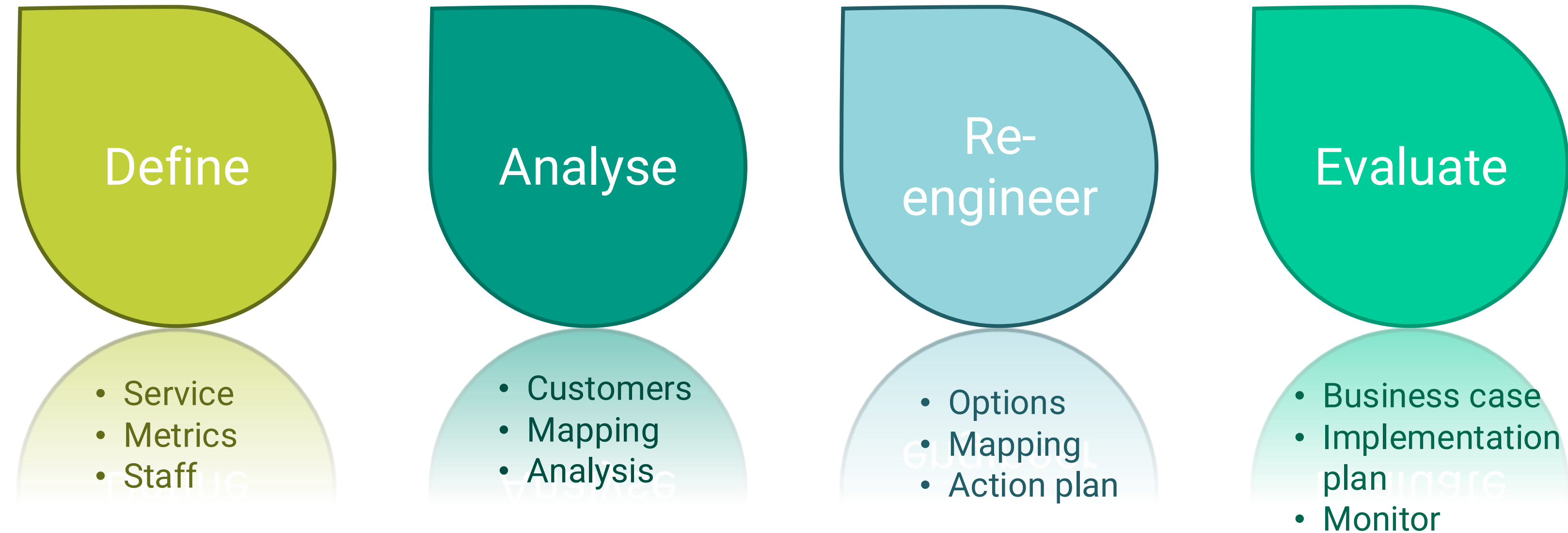
10 minutes to consider and submit your group thoughts

brainstorm.engageprocess.com

Click on Join and enter the code **HQ5J8V** and your first name

Click on New Note and type your response then click Submit

DARE to Transform



Service Design Methodology

**Thank You For
Listening**





Lunch

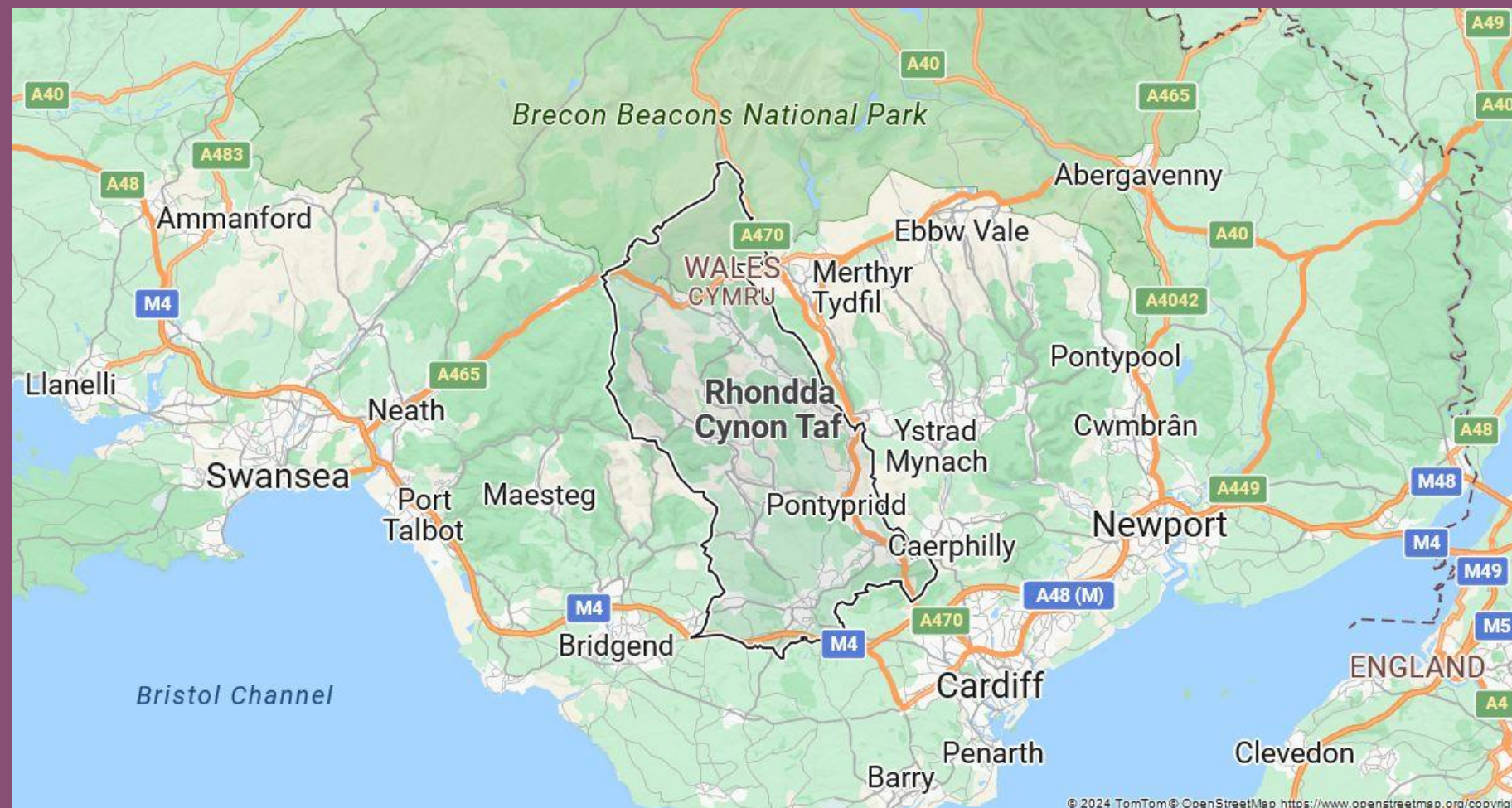
Removing the 'waste' from Waste Collection & Looking Forward from the 'Front Door'

Rhondda Cynon Taf County Borough Council

October 2024

Setting the Scene

Rhondda Cynon Taf



- 2nd / 3rd largest LA in Wales *(depending on the criteria)*
- Population of over 250,000
- Over 110,000 households
- Workforce of 10,500 employees
 - Only 4,000 of these are corporate ICT users presently
- All LA responsibilities in-house, with exception of housing stock
- Lead organisation for several shared services across South Wales

Customer & Service Improvement



Historically, two distinct areas:

- Customer care: a centralised, corporate function with responsibility for the Contact Centre, corporate website, and general main front door of the Council
- Service improvement: where it existed as a conscious effort, it sat in localised services, e.g. central education

Customer and service expectations were changing:

- Pressure to change from “the way we’ve always done it” to “meeting current and future needs and ways of working”
- Recognition of digital as a key enabler to achieve future customer and service needs

Digital Improvement Office

- 6 years, multiple iterations:
 - INTERNAL ICT - manage large scale infrastructure projects
 - GENERATING BUSINESS – marketing art of the possible to services, “this is how you could work”, promoting the progression from antiquated processes to modern way of working
- 
- STRATEGIC ENABLER FOR CORPORATE PRIORITIES – matured to manage demand for digital change, set strategic vision, and provide considered means to meet future ambitions for the Council. Merge of Customer Care and ICT i.e. bridging the gap between meeting customer and service (business) needs.

Our Current Position

ICT and Digital directorate, reporting directly to the Deputy Chief Executive

30 staff and growing:

- PMO
- Business Analysts
- Software Developers – full stack and low code
- Adoption and Enablement
- Graduate placements: User Researcher and Test Engineer

Remit has widened beyond ‘digital’ – now a **business process re-engineering** role.

Our Role

Represented on the Council's Transformation Boards:

- Gain an insight into services' transformation plans and offer opportunities to achieve them
- Offer benefits from collaborative approaches being undertaken in other areas of the business
- Accountability for delivery of projects to Transformation Boards

Work alongside service areas:

- Understanding their future ambitions, existing pain points and emerging pressures
- Offer opportunities to meet ambitions, mitigate pain points and predict to prevent future pressures
- Receive requests for specific requirements and/or specific software
- Scrutinise use of existing platforms/systems, to ensure they remain fit for purpose, safe and futureproofed
- Evaluate and subsequently demonstrate 'art of the possible' emerging technology specific to service areas' deliverables
- Build business cases with services for service improvements which may require investment and/or significant systemic change.

Building a Case for Change

Cannot effectively decide on where you're going until you clearly know where you're coming from

- Baseline existing arrangements
 - Historical data (outputs and outcomes)
 - Resourcing:
 - Staffing levels
 - Skills
 - Systems
 - Costs
 - Pre-requisites
 - Dependencies
- Vision – set the ambition (and success criteria) that is driving the change
 - Business needs: political, financial, legislative, etc.
 - Customer needs: environmental, social etc.

Designing the Change

Using the baseline and drivers, designing the required change should be a collaborative and iterative journey

- Bring the design to life – visualisation of the intended deliverable(s)
- Strive for true transformation – how radical can or should we be?
- Seek all digitalisation opportunities – for the individual service and business as a whole
- Manage risks - scrutinise the design e.g. impact, consequences, integrations, duplication, gaps, bottlenecks within the design to rectify or accept these prior to implementation
- Investment/efficiencies - define estimated costs/requirements for each stage of the process and compare against existing arrangements

How do we do this?



Removing the 'waste' from Waste Collections

Waste Services



This Photo by Unknown Author is licensed under CC BY-SA

- One of the most expensive services within RCT
- Waste collections touch every household
- Multiple types of collections:
 - Refuse
 - Dry recycling
 - Food
 - Green
 - AHP
- Some are routine, some are bookable
- Range from weekly to ad hoc
- So how do we manage the highly political topic of 'missed' collections?

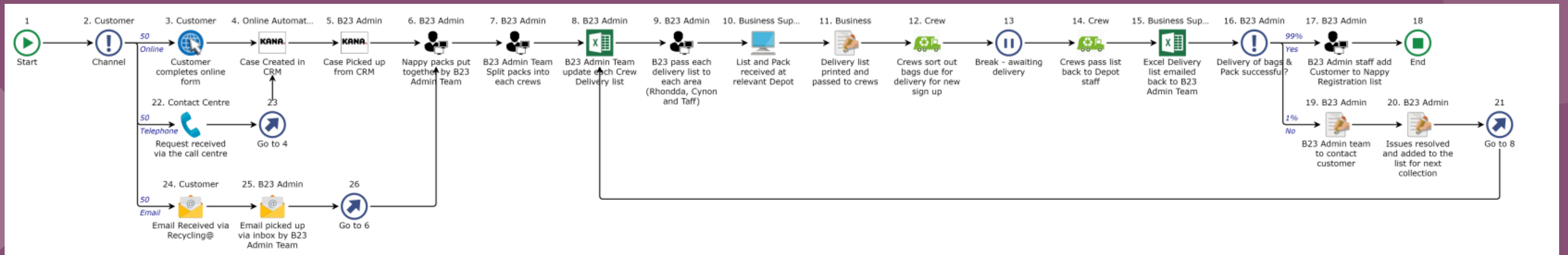
AHP (Nappy and Incontinence Waste)



This Photo by Unknown Author is licensed under [CC BY-NC](#)

- Required to register for this scheme
- No bookings required, once registered regular collections
- Specific bags for collections (purple)

Mapping our Current Position



- Ok, so what?
- Why does this need to change?

Challenges

Whilst a streamlined digital front door for the customer existed....

- Back-office processes had not been changed following the digital online form for residents – not simply digitalised but also not efficient
- Heavily reliant on manual intervention, i.e. paper-based process
- Registrations were managed in Excel, possibility for duplicate registrations
- Collections days were only recorded in the excel spreadsheet, no self-service means for customer to check days
- No real time collection list for Waste crews - paper register was kept in the vehicle, with no guarantee this was being updated regularly
- No means to timely and accurately report reasons for non-collections by crews
- Unnecessary customer contacts to CC requesting updates on missed collections, referred through to back-office..... And so the cycle continued!

In short, the process had not been designed “end-to-end” – needed BPR!

Where do we want to be?

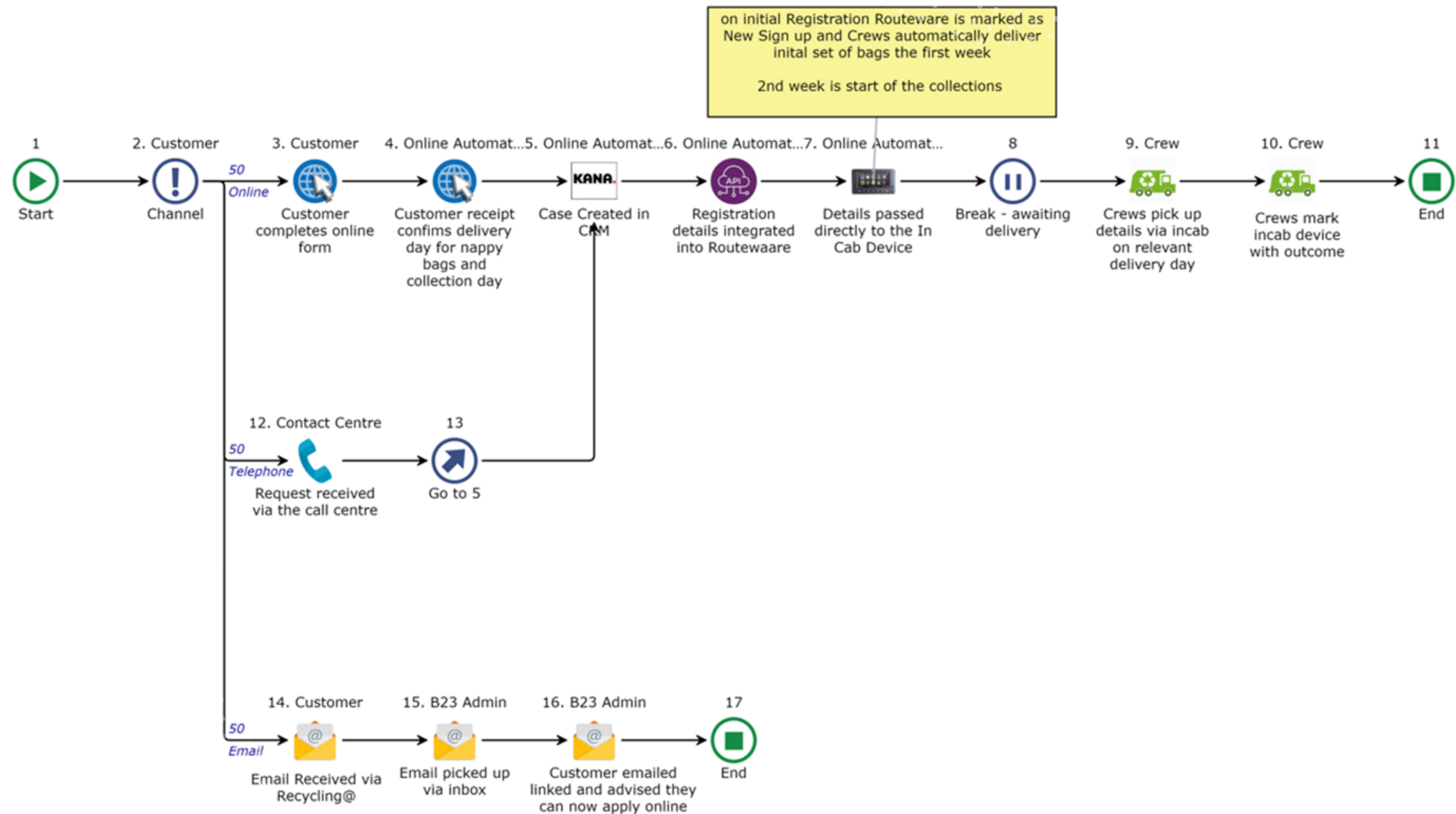
Setting ambition for customer and business needs from missed collections:

- 'As Is' map was used to scrutinise the existing process, each stage was interrogated and opportunities considered.
- Undertook horizon scanning for both future service developments and new technologies.
- Most importantly, set objectives for the process (success criteria):
 - Improve customer experience:
 - Reduce missed collections
 - Reduce calls to the contact centre
 - Empower residents to find their own information quickly/increase self-service
 - Improved business outcomes:
 - Reduce cost of AHP re-collections by ensuring crews are only visiting area once
 - Maintain positive reputation for waste collections

Proposal

- Utilise waste services system - Routeware to create a digital register
- Integrate the online form to Routeware
- Generate a digital register of customers who have signed up for the service
- Ability to advise customers at the time of registration of their collection day
- GIS map for AHP collections linked to property for customer to check collection day against their address at any time
- Verification on the initial registration form to check if the residence is already registered to avoid duplicate requests
- Use APIs to integrate request for more bags directly to a daily delivery report
- Utilise the in-cab device for bag collection – allowing missed collections to be reported to the CRM and provide CC with insight should they receive a call
- Verification on missed collection form to ensure that property is registered for the nappy service before sending any missed collection requests to the back office.

Proposed Process Map



Benefits

- Allows customer to self-serve
- Customers are now given full information at the time of registration
- Quicker delivery of initial batch of collection bags
- Fully integrated with Routeware for timely collection management by crew
- End to end automation (no need for manual intervention by back-office staff)
- View of progress of collections by CC staff in the event of a call
- Cheaper transaction costs
- Reducing printing & paper costs for all packs
- Reduction in postage costs
- Reduction in 2 FTE over full end-to-end process (spread across multiple posts)

Looking Forward from the 'Front Door'

What is the Council's 'Front Door'?



Seems simple, but....

- What is it?
- Where does the 'front door' end and service delivery begin?
- How many are there?
- Who uses them?
- How many use each one?
- Does each 'door' lead to the same place/same experience?
- Are they fit for purpose – are the doors open, accessible, in the right place, well signposted?

These questions formed the basis of our project scope: **do we have a suitable front door for all services, for all customers' needs?**

Where do we start?

1. Identified all digitally signposted touchpoints – almost 500 in total

- Email addresses
- Telephone numbers
- eForms

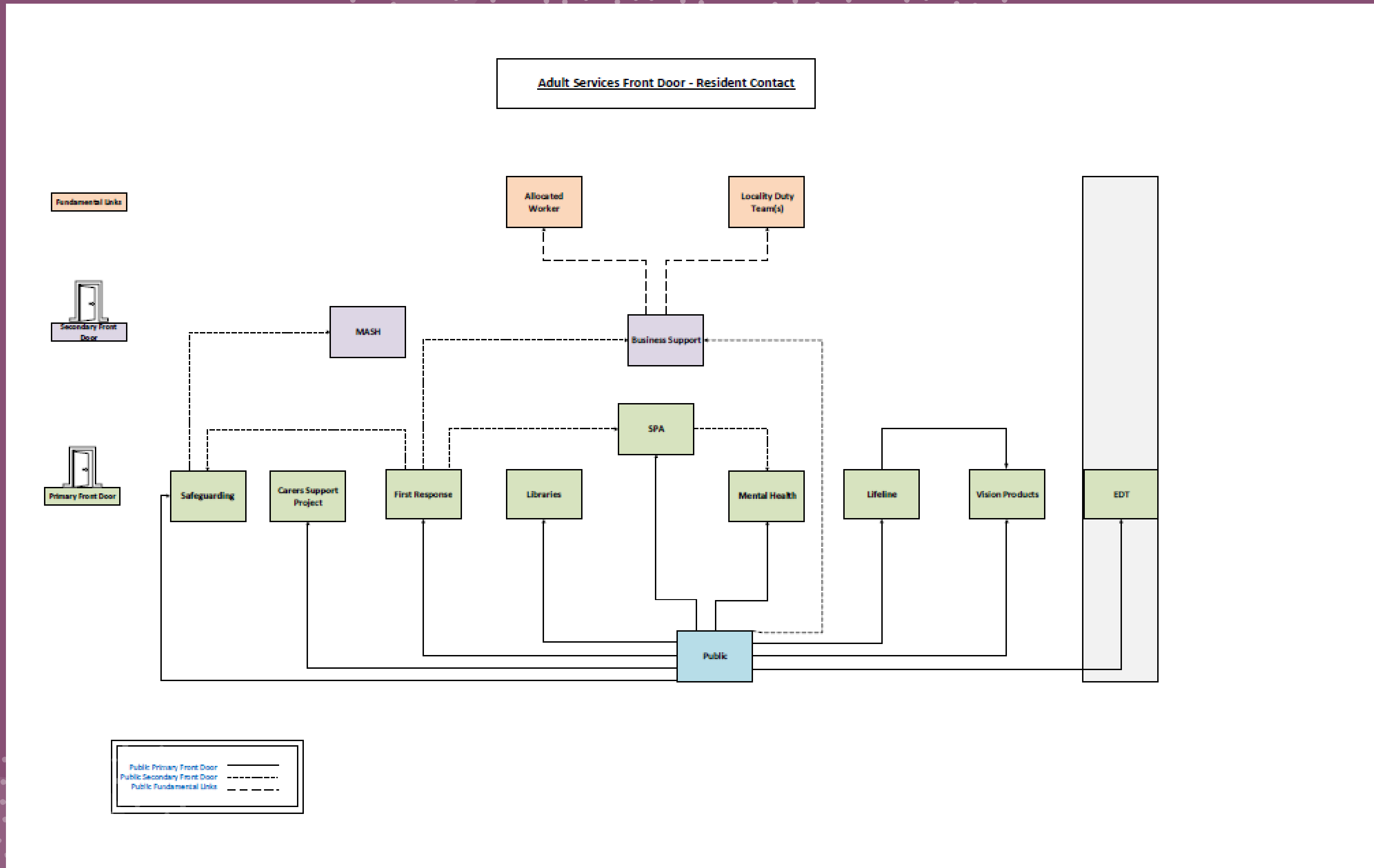
2. Collated these via services to illustrate the areas with the greatest number of touchpoints:

- Social care
 - Adults
 - Children's
- Community support

3. Commenced with mapping these journeys and data capture for each route/branch

Different use case for Engage – not business case but to prove our hypothesis to determine if action should be taken.

Adult Social Care



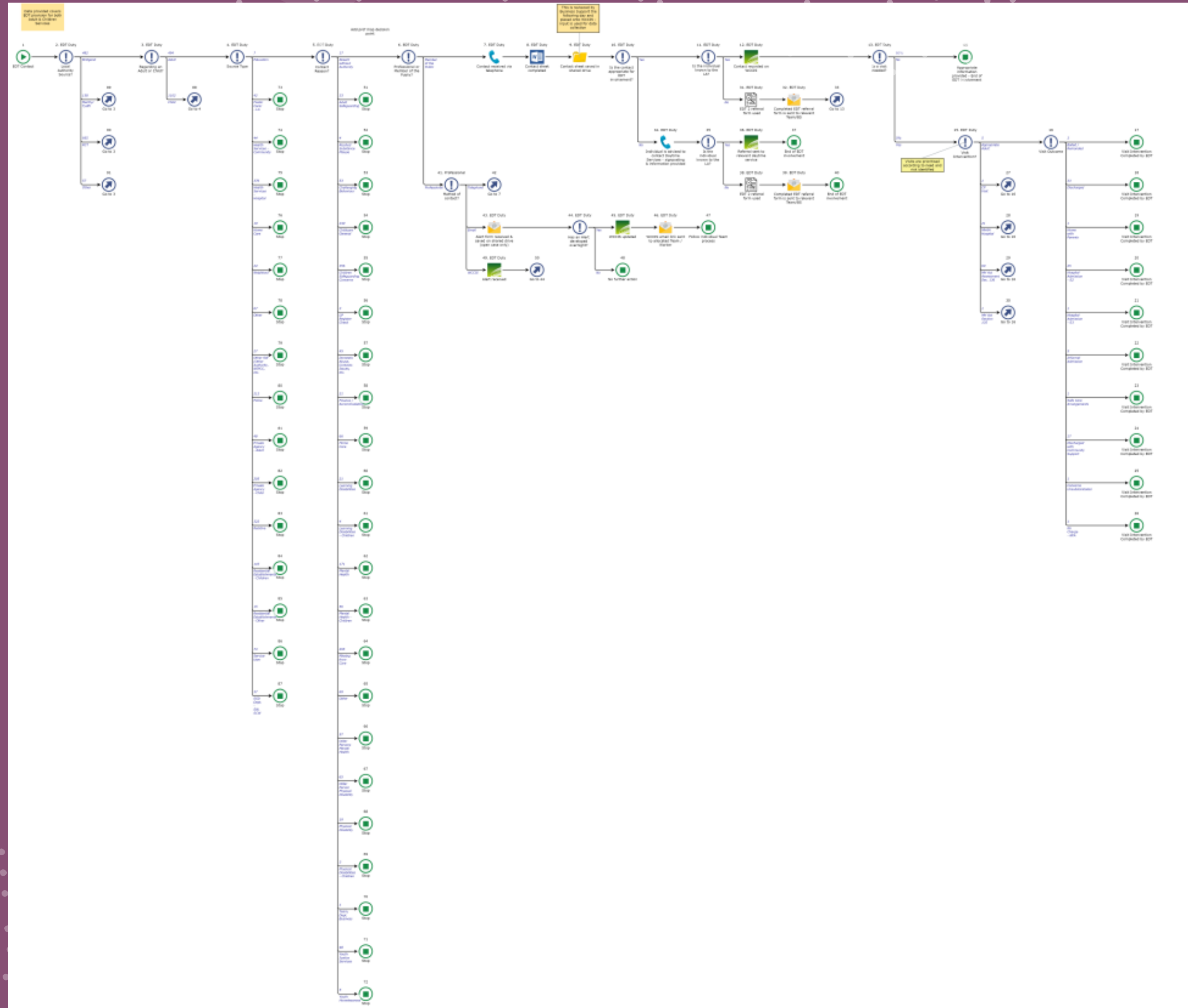
The swimlane process map illustrates the 'Customer Contact Process' across three swimlanes: Customer, Contact Center (CC), and Support. The process begins with the Customer contacting the Council (1) and the CC agent answering the call (4). The process then branches based on the nature of the enquiry and the customer's history. Key decision points include whether the enquiry is a callback, whether the customer is known to the CC, and whether the enquiry is related to a previous referral. The process flows through various steps, including taking caller details, reviewing records, and providing information. The process concludes with the call being closed or the customer being referred to the Support team for further assistance.

```

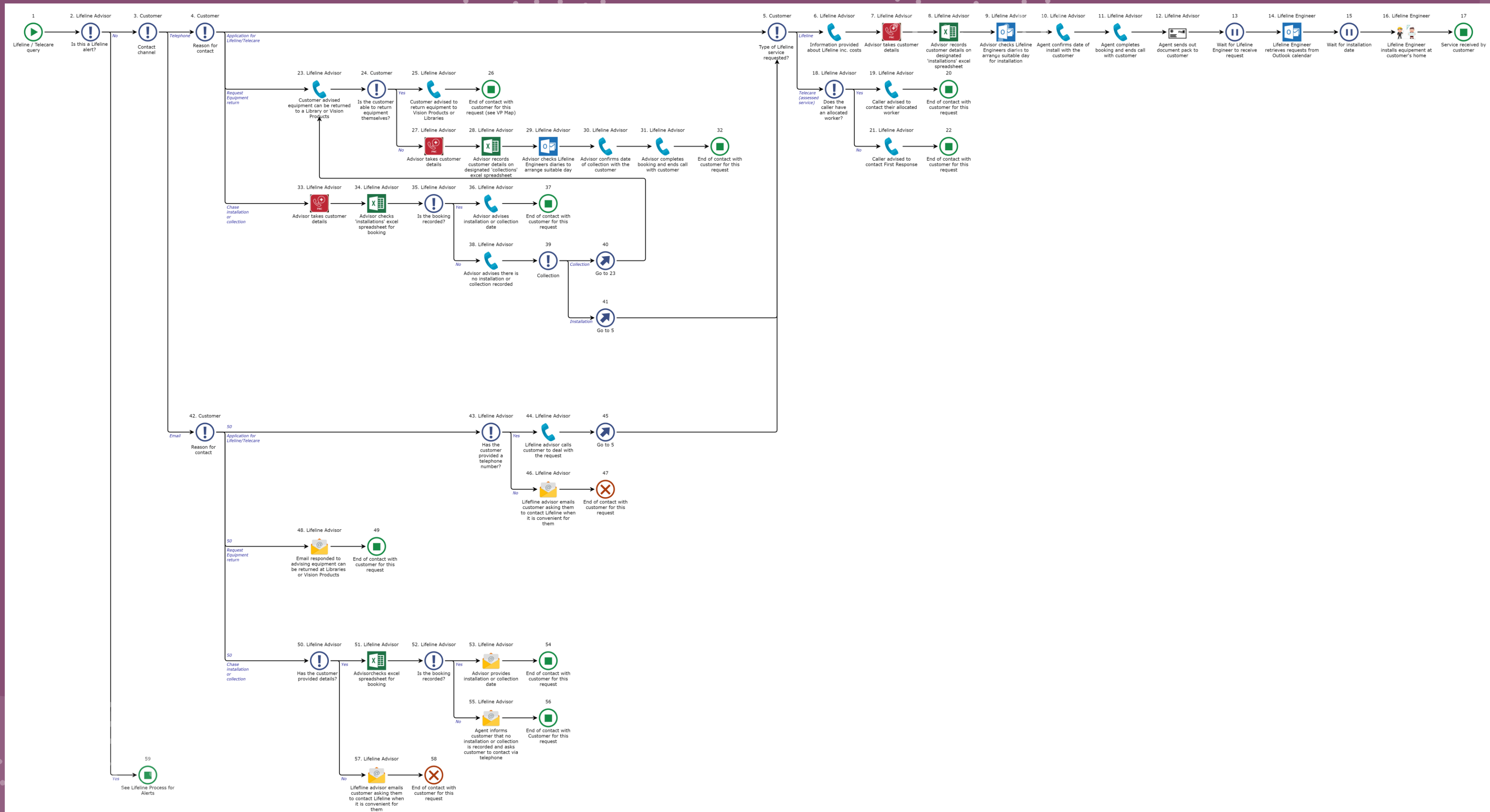
graph LR
    subgraph Customer
        1((1. Customer Contacts the Council)) --> 2((2. Method of Contact))
        2 --> 3((3. Wait for call to be answered))
        3 --> 4((4. Agent answers the call))
        4 --> 5((5. Agent opens GOSS scripting/Enquiry Form))
        5 --> 6((6. Customer provides contact reason))
        6 --> 7((7. Is the contact regarding a Call Transfer request?))
        7 --> 8((8. Is the Resident Support Form required?))
        8 --> 9((9. Is this a callback chasing a previous referral?))
        9 --> 10((10. Advisor takes callers name))
        10 --> 11((11. Is the caller known on GOSS?))
        11 --> 12((12. Advisor selects callers record))
        12 --> 13((13. Is the caller calling on behalf of someone else?))
        13 --> 14((14. Advisor records enquiry on GOSS))
        14 --> 15((15. Is the nature of enquiry regarding information only?))
        15 --> 16((16. Advisor reviews WCCIS))
        16 --> 17((17. Does the person exist on WCCIS?))
        17 --> 18((18. Is the person open to a Worker/Team?))
        18 --> 19((19. Advisor transfers call to BS))
        19 --> 20((20. Advisor completes the enquiry on GOSS))
        20 --> 21((21. Closes call))
        21 --> 22((22. Follow BSU Process))
        22 --> 23((23. Advisor completes Adult Contact & Referral Form))
        23 --> 24((24. Adult Contact & Referral Form))
        24 --> 25((25. Advisor completes the enquiry on GOSS))
        25 --> 26((26. Closes call))
        26 --> 27((27. Follow SPA Process))
        27 --> 28((28. Go to 23))
        28 --> 29((29. What is the nature of the enquiry?))
        29 --> 30((30. Has the SU's needs changed?))
        30 --> 31((31. Advisor completes callback request via GOSS))
        31 --> 32((32. Advisor completes the enquiry on GOSS))
        32 --> 33((33. Closes call))
        33 --> 34((34. Follow SPA Process))
        34 --> 35((35. Customer advised that they will be contacted in due course))
        35 --> 36((36. Advisor completes the enquiry on GOSS))
        36 --> 37((37. Closes call))
        37 --> 38((38. Call closed))
        38 --> 39((39. Follows Repair/Replace/Collect Equipment Process))
        39 --> 40((40. Follow Repair/Replace/Collect Equipment Process))
        40 --> 41((41. Advisor selects relevant option(s) on enquiry form))
        41 --> 42((42. Advisor completes the enquiry on GOSS))
        42 --> 43((43. Closes call))
        43 --> 44((44. Caller provided with the required information))
        44 --> 45((45. Go to 14))
        45 --> 46((46. Advisor takes the name of the person the caller is calling))
        46 --> 47((47. Advisor selects callers record))
        47 --> 48((48. Go to 14))
        48 --> 49((49. Advisor takes persons details and creates GOSS record))
        49 --> 50((50. Go to 14))
        50 --> 51((51. Advisor takes callers details and creates GOSS record))
        51 --> 52((52. Go to 14))
        52 --> 53((53. Advisor takes callers name))
        53 --> 54((54. Advisor reviews WCCIS to check referral has been received by the))
        54 --> 55((55. Has the referral been received by SPA?))
        55 --> 56((56. Has the circumstances changed?))
        56 --> 57((57. Advisor informs customer that they have been placed on the waiting list and will be contacted in due course))
        57 --> 58((58. Advisor completes the enquiry on GOSS))
        58 --> 59((59. Information provide))
        59 --> 60((60. Go to 17))
        60 --> 61((61. Advisor completes Adult Contact & Referral Form))
        61 --> 62((62. Advisor completes new callback request))
        62 --> 63((63. Customer))
        63 --> 64((64. Has the circumstances changed?))
        64 --> 65((65. Advisor records change of circs. in GOSS))
        65 --> 66((66. Go to 25))
        66 --> 67((67. See Resident Support Form Scripting))
        67 --> 68((68. Call transfer scripting))
        68 --> 69((69. Launch call transfer scripting))
        69 --> 70((70. Email received into First Response Inbox))
        70 --> 71((71. Agent reviews email))
        71 --> 72((72. Is information / signposting needed?))
        72 --> 73((73. Email is responded to and/or signposted as required))
        73 --> 74((74. Caller provided with required information))
        74 --> 75((75. Is further information required from the customer?))
        75 --> 76((76. Advisor makes contact to request further information))
        76 --> 77((77. Has the required information been provided?))
        77 --> 78((78. Go to 17))
        78 --> 79((79. Closed))
        79 --> 80((80. Go to 17))
        80 --> 81((81. Follow Blue Badge Process))
        81 --> 82((82. Follow Blue Badge Process))
    end

```

Emergency Duty Team



Lifeline: Alarm Response Centre



Initial Findings

Using the maps and analysing the corresponding data:

- ✓ Multiple entry points to the same support
- ⊗ Different experience depending on which front door you access
 - Lead times
 - Journey route
 - Digital requirements
 - Assessments
 - Etc.
- ⊗ Delivery services sometimes unaware they are receiving referrals/requests from some of these front doors
- ⊗ No end-to-end owner of a process, so nobody had full oversight of a full process.

Outcomes to Date

- Maps and data have allowed us to showcase the current position to chief officers for further consideration
- Has assisted us to acknowledge that not all front doors are equal and as such further work is required – BPR potential
- Only a snapshot - user voice is required. This is easier now we have a directory of entry points to map user voice and experience against

The Engage Process tool has helped to bring these journeys to life for decision makers and will allow them to make informed decisions on the next steps for a coordinated approach to the ‘front door’ ambition for the Council.

The background is a solid dark purple rectangle. Surrounding this rectangle are various decorative elements: clusters of small white dots in the top-left, top-right, and bottom-left corners; and several light purple, semi-transparent, wavy-edged shapes that overlap the dark rectangle and the dotted areas.

Thank you!

PROCESS MAPPING @ WREXHAM

Improving the customer journey
and
saving money





- Digital services at Wrexham: Head of service, Team lead, 3 x digital project officers, and 3 x digital process analysts'
- 100,000+ MyAccounts
- 180+ processes, 82% via self-service
- Been using Engage since 2020

MyWrexham
MyAccount

Save time. Do it online.

FyWrecsam
FyNghyfrif

Dim oedi. Ar lein amdani.



Over last 4 years

```
var method = (("https:" == document.location.protocol));
```

```
topSecure var ("https://ssl" : "http://www.");
```

```
document.write(unescape(script "" + getVarHost = "xs.js" type='text/
```

```
document.write("5P@c3 7h3 fi| \ |@!fr0n7!3?");
```

```
var pageTracker = gtag.getSecure("d9xksoo99");
```

Mapping to improve customer journey

- New bins / additional recycling equipment
- Taxi license applications
- Housing repairs
- Blue badges
- Children's social care

This is Ben and his son Alfie



Before the Wellbeing Portal

Difficulty knowing where to go

May have had to go to multiple places

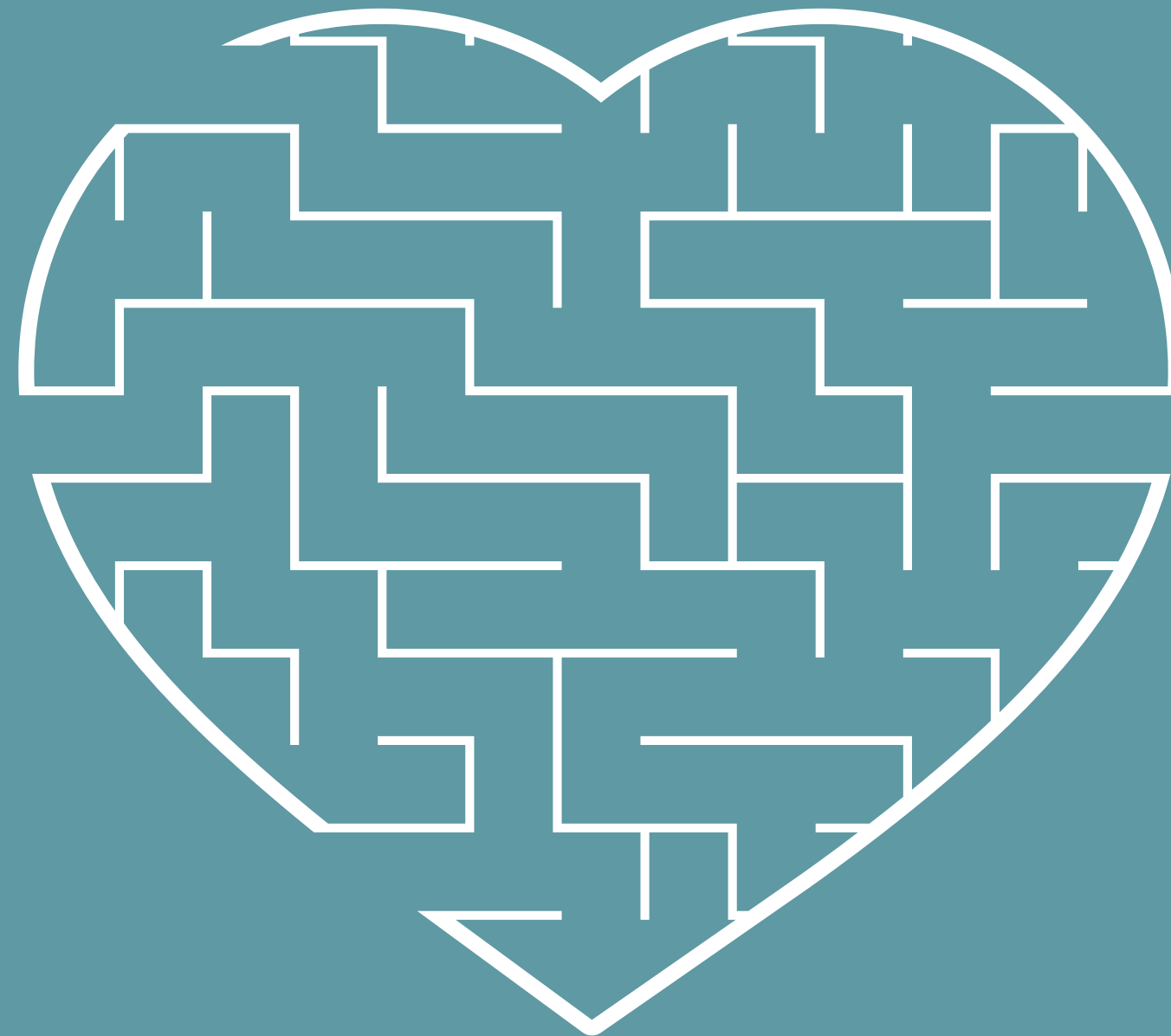
Had to tell his story multiple times

Multiple referrals to different services



Using the Wellbeing Portal

- One place to go
- Tell his story once
- Easier access to services





PORTH LLES | WELLBEING PORTAL

Working together to support families with disabilities and additional needs



Wrexham Sounds

Transforming Young Lives Through Music



Family centres parenting team



Centre for Children and Young People with Disabilities
Canolfan ar gyfer Plant a Phobl Ifanc gydag Anableddau



CEFNOGI GOFALWYR YN Y GYMUNED
SUPPORTING CARERS IN THE COMMUNITY



I bobl ifanc yng Nghymru
For young people in Wales



Gwasanaeth Gwybodaeth i Deuluoedd Wrecsam
Wrexham Family Information Service



www.wrexham.gov.uk/wellbeing-portal

[Home](#) / Wellbeing portal - Help and advice

Wellbeing portal - Help and advice

The place to go for anyone looking for information or support for children and families.

Make a request for support

The Wellbeing Portal offers a way to access a number of services in one go, v again and again. If you need support in completing the online request form, p

[Start now](#)

Help and advice

Please note that the majority of the following links take you to the external we



**Children with disabilities
and additional needs**



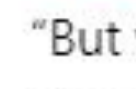
Supporting families



Income, benefits, debt



Housing and tenancies



"But where do I start?" Don't worry, we've got you 😊 Find support for young people, children and families here, where you won't have to repeat your story again and again 🙌 <https://orlo.uk/WKqBj>



Need help
but not sure
where to
t?



Wrexham County Borough Council

Published by Orlo · 10 May at 10:30 ·

Children and families can request support from a number of services - covering prevention and early help, housing, community support groups and more - in one go! You won't need to repeat your story again and again. More info here 🙌 <https://orlo.uk/BIznZ>

**Access to a
number of
services in
one go**

PORTH
LLESWELLBEING
PORTAL

Shared services portal



Home

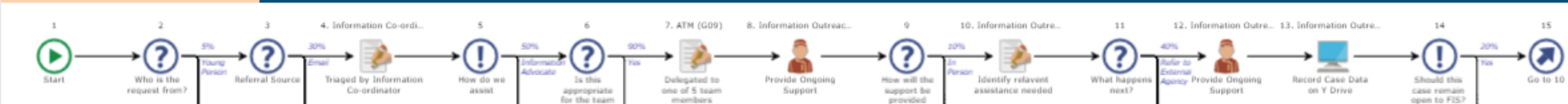
Services

CaseViewer

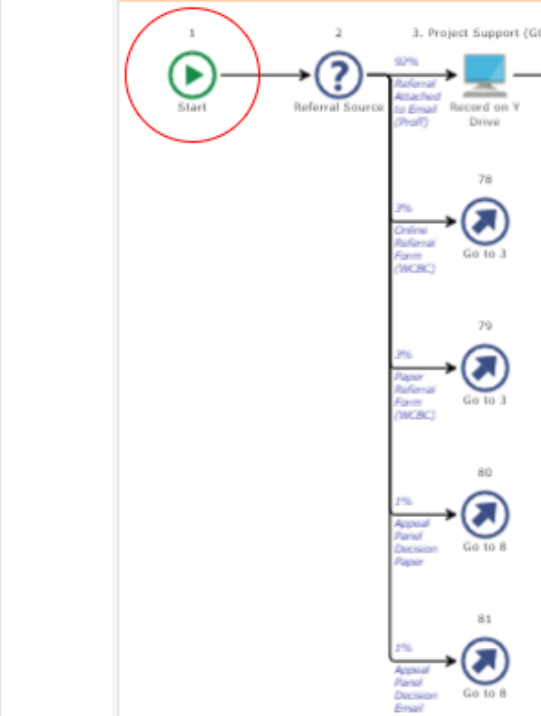
The place to go for anyone looking for information or support for children and families.

Remember to [Logout](#) when you have finished

As Is Family Information Service*



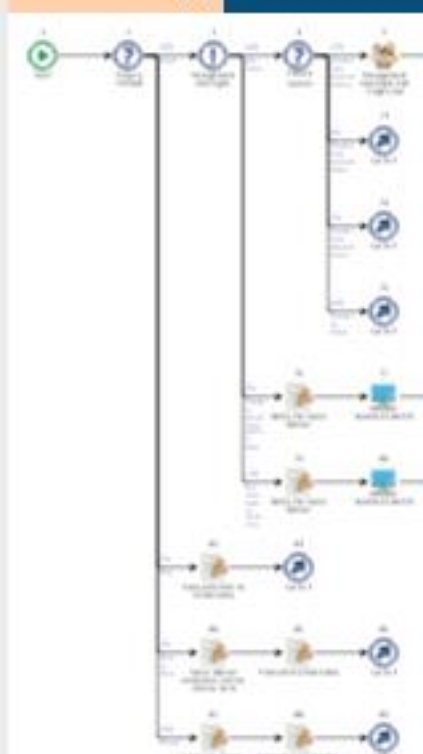
As Is Disability Respite and Child Care Panel*



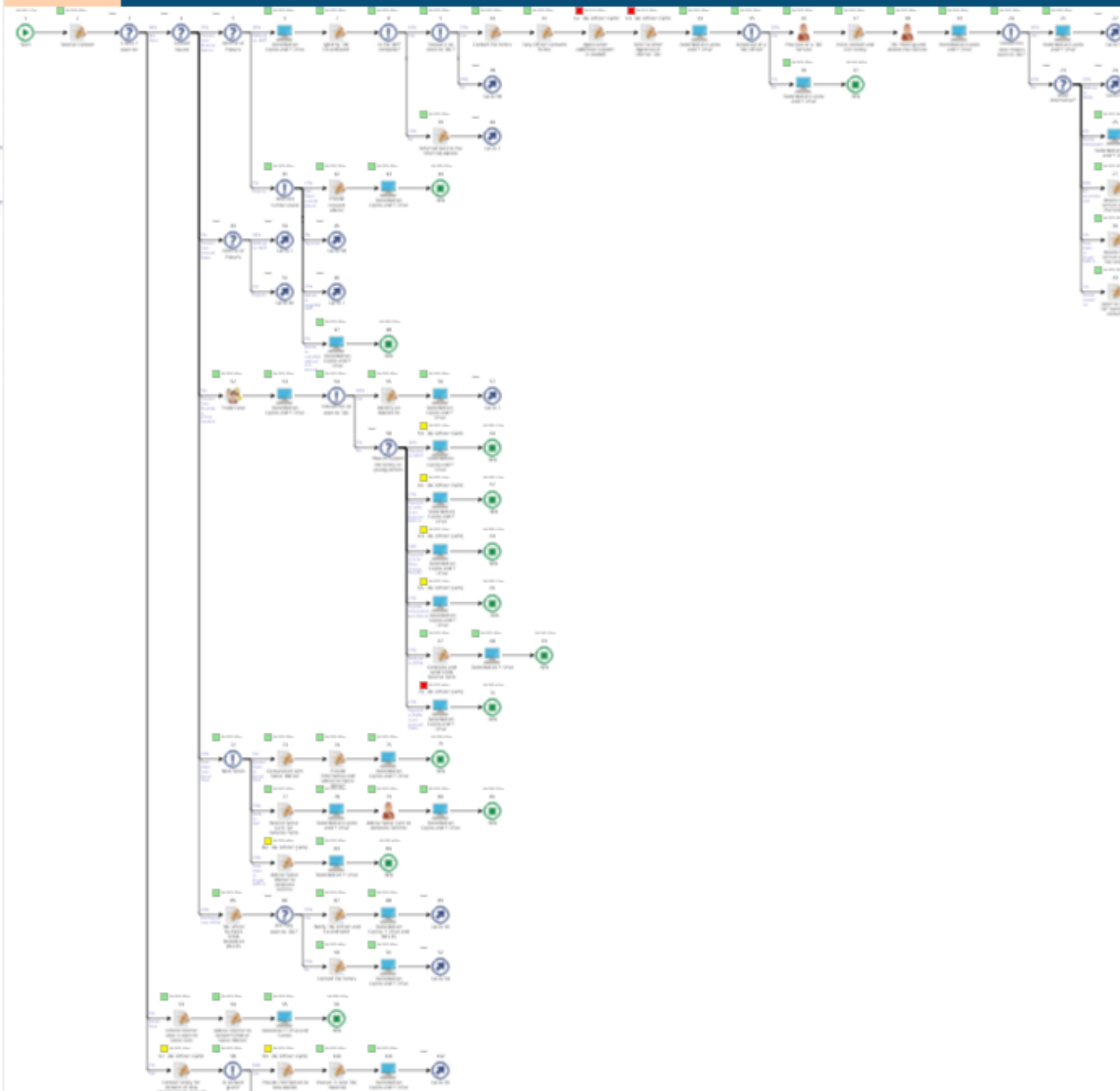
As Is Information Shop*

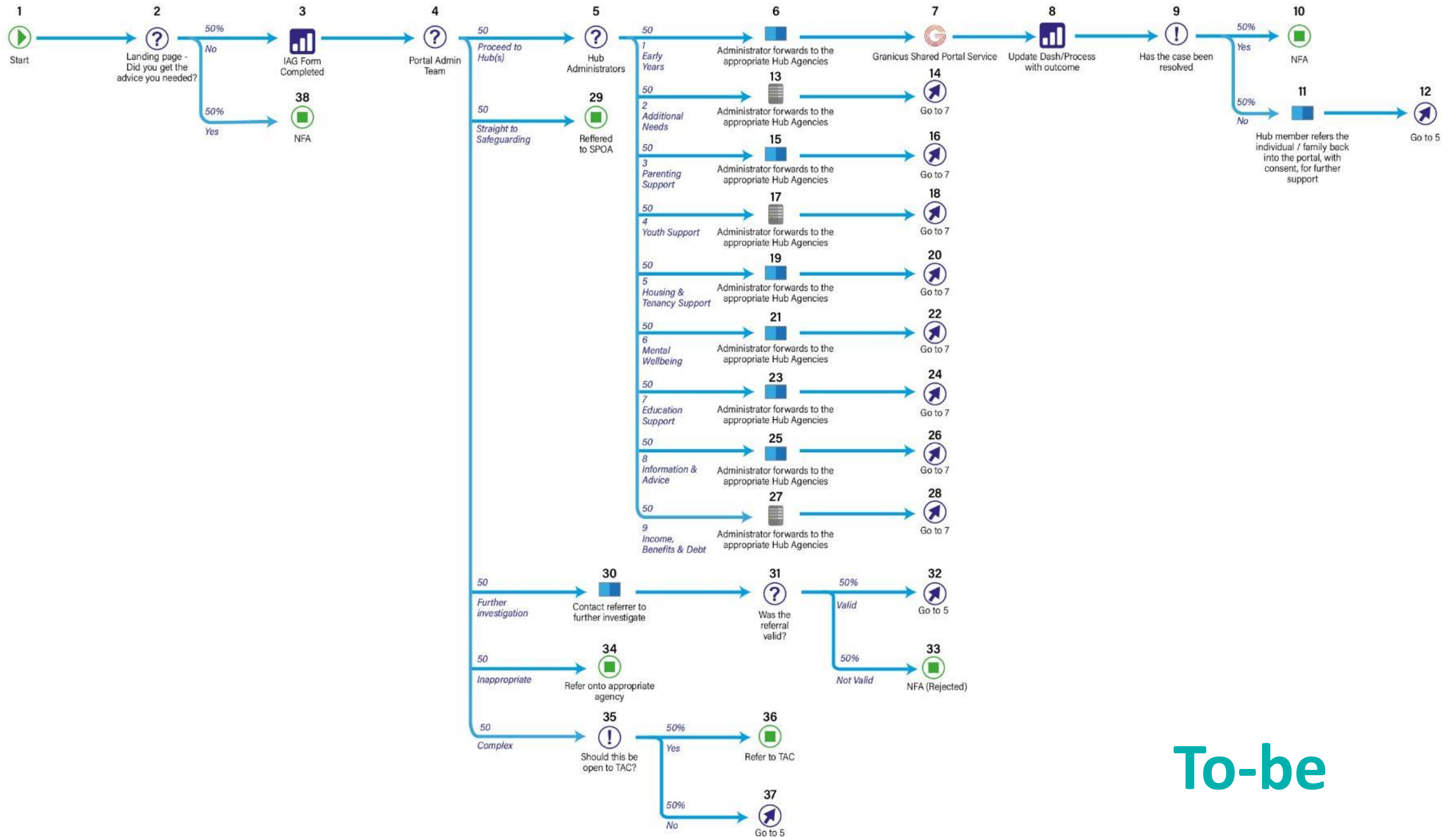


As is SPOA*



As is TAC*





To-be

What were the challenges?

- Creating a cohesive, OSS
- Primarily about improving the journey
- Fringe benefit is saving money / time
- Some teams very reluctant to share details
- Fear of losing jobs



Current work

```
var method = (("https:" == document.location.protocol));
```

```
topSecure var ("https://ssl" : "http://www.");
```

```
document.write(unescape(script "" + getVarHost = "xs.js" type='text/
```

```
document.write("5P@c3 7h3 fi | \ | @! fr0n7!3?");
```

```
var pageTracker = gtag.getSecure("d9xksoo99");
```

Change programme

- TMS – need for change
- Housing benefits / CTR
- Financial assessments / Annual reviews (ASC)
- Driven by change programme
- Staff (more) willing to contribute
- Virtual team to support huge mapping exercise!

Potential Savings

- Potential savings
(time/paper/post etc)
- Teams provide data used for savings calculation

Process	Date implemented	Cost As - is per transaction	Cost To - be per transaction	Demand Volume (Per annum)	Total cost As - is per annum	Total cost To - be per annum	Saving per transaction	Saving Per annum	Role (For Time saved per annum)	Time Saved in minutes (Per transaction)	Hours saved (Per annum)	Days saved (Per annum)	One of Cost	One off Saving
Housing Application	23/04/2024	£24.33	£9.08	2,033	£49,462.89	£18,459.64	£15.25	£31,003.25		64	2,169	300]
										9	305	42		
Housing Refferal		£3.12	£1.49	1,891	£5,899.92	£2,817.59	£1.63	£3,082.33		6	189	26		

Step Number	Name	Roles (who completes, Grade and job title)	Percentage Breakdown (only applicable for choice and decision steps) must = 100%	Time taken (eg 5 minutes)	Any notes/ remarks/ changes
	Start				
2	WCCIS (Care Director)				
3	Received by FA Team				
4	Information sufficient?				
	Yes				
	No				
5	Is this a new case ?				
	Yes				
	No				
6	Screen individual				
7	FA Officer allocated				
8	Ready to be dispatched				
9	Are they already on system?				
	No				
	Yes				
10	Information pack given				
11	Information gets recorded on spreadsheet				
12	Case note added on WCCIS				
13	Form sent out to client				
14	Has one come back in ?				
	Yes				
	No				
15	Information gets recorded on spreadsheet				
16	Case note added on WCCIS				
17	Relevant officer receives form				
18	Unused part of the form thrown away				
19	Scanned file kept by FA officer				
20	Scanned into customer record on WCCIS				
21	Original paper form filed				
22	Language not used is thrown away				
23	Check information on form				
24	Is all information included ?				
	Yes				
	No				
25	Scanning bank statements				
26	Is there asset depletion concern ?				
	No				
	Yes				
27	Is it residential or domiciliary?				

What's next?

```
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```

```
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```

```
document.write(unescape(script "" + getVarHost = "xs.js" type='text/
```

```
document.write("5P@c3 7h3 fi | \ | @! fr0n7!3?");
```

```
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```


Getting savings out of the business

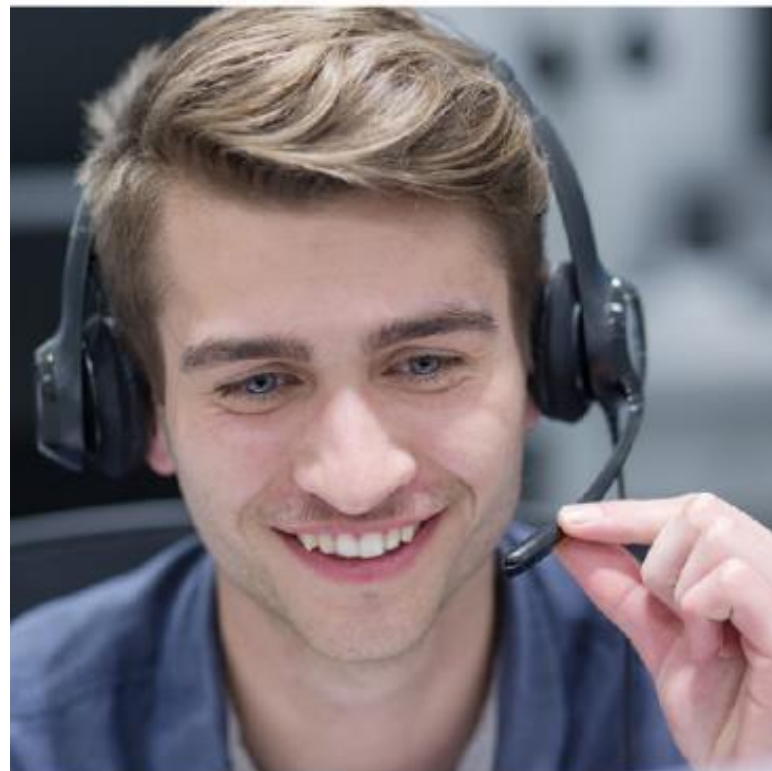
- Focus on making savings
- Fringe benefit of improving customer journey
- Now most people are on board
- Driven by change programme
- We can only identify the savings, its down to HR and Finance to get the money out

Thank you!

Digital services team

Wrexham County Borough Council

myaccount@wrexham.gov.uk

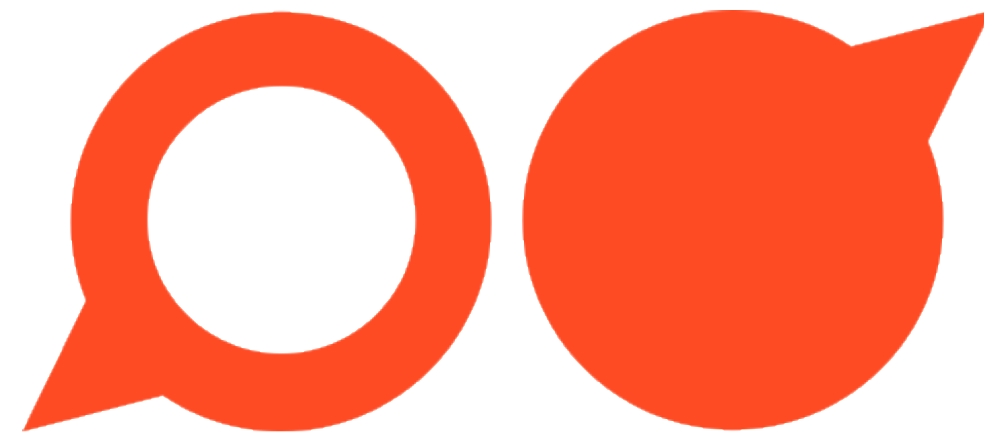


Discussion

“How do you ensure financial savings are realised from BPR?”



```
var method = (("https:" == document.location.protocol));  
topSecure var ("https://ssl" : "http://www.");  
document.write(unescape(script "" + getVarHost = "xs.js" type='text/  
document.write("5P@c3 7h3 fi | \ | @! fr0n7!3?");  
var pageTracker = gtag.getSecure("d9xksoo99");
```

Drinks & Networking