

Firmstep

Channel Shift: Job Application Process

Since 1 January 2015 – more than 500 job applications have been completed online for 62 different jobs. This has significantly reduced the administrative tasks, printing and postage costs in sending application packs out (of which there have been only 44 requested through customer services). The process also has a fully automated database behind it so that jobs can be made available for application directly by HR.

Previously, this would have cost the council £100 per advert – (£6,200).

The last four jobs advertised have shown:

Tourism Services Assistant – 2 paper/6 online
 Customer Services Advisor – 0 paper/17 online
 Transport Admin Assistant – 0 paper/9 online
 Community Sport Activator – 0 paper/14 online

Service Comment: “Nearly all applications are now received online – result.”

The Future: As the new HR and Payroll system will have its own self-service platform, the Business Improvement Unit has concentrated on processes affecting customers rather than internal staff in this area. It is however hoped that the improved data in the HR system can be used to improve all of the business process by escalating cases and request to line managers accurately.

The Customer: Feedback and Communications

Ensuring that the customer is informed of progress at all stages of the case has been an important requirement for all processes. Since going live we have worked on ensuring that emails are automated as much as possible and display a distinctive corporate and professional branding.

We have modified all of the automated templates to show the approved corporate styling.

Automated Acknowledgements: Customers are automatically acknowledged (regardless of channel) that their request has been logged if they have an email address. We have sent out more than 7,000 automated acknowledgements and booking confirmations.

Customer Responses: We also ensured that customers are responded to regardless of channel. We sent completed case notifications to all customers with an email address and even for those with a self-service account this negates the need to log in and check the progress of cases (a process that has been deemed good practice by the Cabinet Office). While some processes do not specifically require a response or the response has been completed by phone or letter, we have sent out more than 2,000 automated responses. Further to feedback from Officers and an analysis of responses we are now improving the processes with an email preview so Officers can see their response before sending. This has proved very successful for General Enquiries and we will be implementing this on all processes in the coming weeks.

Case Summaries: Feedback from Councillors has also shown that the Self Service Portal has proved a popular channel for reporting service requests during ward surgeries. However, where the Councillor raises a number of requests this did get confusing when the response arrived to say that the case had been completed. In response to this we have now added a case summary to the acknowledgement for all self-service customers providing a summary of all of the information submitted. This went live in June 2015 and has helped to tie up responses with cases submitted.

Payment Receipts: Since going live with Firmstep, we have also introduced the ability to pay for some services online (eg. garden waste bins). While integrating with third party payment engines is always tricky, we identified issues with the way the third party software worked in order to provide receipts. Again, we have now made the process simpler and automated the receipts within Firmstep and have been able to provide a more professional corporate branding to the receipt. Since introducing these at the end of June, we have now provided 442 payment receipts to customers.

Case Status Notifications: The Firmstep platform has also created a number of customers in partner agencies (NYCC, NHS, YCH, Yorkshire Housing) through the multi-agency Handyperson process developed for the Home Improvement Agency. Feedback also suggested a requirement for them to be kept up to date of progress on their requests. Since introducing case status notifications in June 2015, we have now sent out more than 2,000 notifications informing officers and customers of the status of their case.

The Future: The Cabinet Office has recently stated their intention to work on automated notifications to customer and users without them having to do anything.

We will continue to ensure that communication and notifications are easy and effective within all processes within the platform. We will also provide more corporate branding to the internal notifications to officers and make use of new functionality to remind and escalate cases and notify managers where necessary.

The Customer/Introducing Efficiencies: Clinical Collections

While Clinical Collections was part of the initial CRM processes re-designed, we have continued to develop this further with Cleansing Services.

The daily collection list which was previously manually typed from individual job sheet emails has now been automated and the requirement for emails and pdfs to be printed has been removed. The automated collection list also groups addresses on Cleansing Round and postcode to assist with efficient route planning.

We noticed that some customers forget to put out their collection once booked. Instead of waiting for a missed bin complaint the officer can now easily close the case as not collected and this will prompt Customer First to contact the customer and re-book providing a good level of customer service and not a complaint.

The Future: We are now working specifically with Clinical Collections using the Mobile App to provide the daily collection lists and to close down cases while collecting at the premises. We hope the work on this will provide a template for rolling out the app across all Cleansing Services.

It would also be nice to offer more control over the number of booking slots in the future so that these can be more dynamically amended depending on demand.

Introducing Efficiencies/Improving the Business with Data: Contaminated Bins Enforcement Process

On 28/07/2015 – two members of the team came to discuss what we could do with identifying contaminated bins and repeat offenders. The process was designed, tested and ready for use on 17 August 2015.

Since this time, more than 924 cases have been entered. It has identified 53 repeat offending properties (some properties up to seven times).

The data shows the worst offending areas to be Woodlands, Eastfield and Central. The data can also be broken down to street and property.

The Future: We are already looking to improve the process for searching for streets with a house number and dealing with shared bins.

We would like to work with the Service to complete the final enforcement stages of the process and provide more reporting outputs within GIS.

Introducing Efficiencies: Back Office Integration – Uniform IDOX

Integrating two systems from different suppliers is always tricky and often costly. With the Firmstep platform we have successfully integrated processes with the IDOX Service Request module. This has meant that requests for service are automatically fired into IDOX as soon as the customer or Customer First hits the submit button.

There are now six processes firing good quality information directly into IDOX:

- Food Advice (124)
- Food Complaints (85)
- Food Premises Registrations (17)
- Pollution (733)
- Noise (645)
- Health & Safety (125)

If each request took 10 minutes to input, this has now saved more 288 hours of work (2 months at 37 hours per week).

The Future: The Council has now taken part in some advanced training to be able to improve the existing process and offer some two-way integration back to Firmstep. This may also be available to initiate new mobile-based processes to update actions and notes in relation to these cases.

Introducing Efficiencies: Back Office Integration – Document Management/EDRM

While the Firmstep Platform provides its own workflow and case management, it is also important to recognise the advantages of integrating this with a dedicated document and records management system.

On initial launch of self-service and the removal of the general email inbox for customer services, it became apparent that there was a demand for customers to contact the Council using an online form for Council Tax and Business Rates enquiries. While the General Enquiry form was able to provide a stop-gap for these sorts of enquiries, it also provided some detailed metrics on the volumes and types of enquiry. Feedback from the service also identified integration requirements with the current document management process to initiate workflow. By the end of November, a new online process was developed to deal with such enquiries and now provides clear navigation to other more appropriate online forms depending on the type of enquiry.

All enquiries are directly fired into and indexed into the current document management system (where a correct reference number is provided by the customer). Since this time, more than 300 enquiries have been received and for self-service customers is used during office hours as well as out of office hours.

Following on from this work, integration has now been undertaken with three processes within Planning Services which went live in August. As more processes are developed for Planning Services to cover planning surgeries and advice on

householder applications more integration into the document management system will be developed.

The Future: As the new EDRM system is developed and implemented, all processes will be developed to integrate directly and how to deliver seem-less two- way integration between both systems is also been considered as a development requirement.

The Customer/Introducing Efficiencies: EHS - Food Premises Registration

In June, we undertook work to produce a Food Premises Registration Form for the Food and Occupational Safety Team.

The online version went live on 01/07/2015 and since this time 14 registrations have been received online.

- As well as replicating the original form as a PDF, the new process also creates a Service Request directly into IDOX to action the task.
- It sends an information alert to Business Rates informing them of a new business/owner.
- It sends an information alert to north Yorkshire Trading Standards (a task previously done manually).

Without any marketing or direction, 40% of new registrations are now received online.

The Future: Work further with the Service to transfer all forms on the website to on-line efficient processes with integrations into IDOX or EDRM.

Work with the Service to deliver inspections using tablet devices.

Delivering a Multi-Agency Process

During implementation of the Firmstep Platform, the first process to go live (to meet the deadlines of a new service delivery contract) was developed for the Home Improvement Agency.

The initial process was delivered during April 2014 and since this time has received more than 2,900 referrals from more than 200 officers (outside of SBC).

The process is a great example of an end-to-end process delivered completely online through the platform with no paperwork and administration. The process allows referrals to be received, authorised, allocated, booked, actioned and invoiced as part of a workflow across agencies. Handypersons are equipped with ipads to receive, allocate, book and action all cases without the need to travel into the office to pick up job sheets. Analysis of cases easily demonstrates how three partner organisations can request, authorise and deliver a service to a client within just two hours.

Since this time, an online process to request chargeable small repairs has also been developed. More than 230 requests have been made and growing on a daily basis as the service has become established.

A process to deliver Well Being Assessments to take advantage of the off-line mobile working solution has been delivered and since launch, more than 750 assessments have been undertaken. The process delivers automated support plans for clients and online referrals to other agencies.

With the data collected in a consistent way, integration with the council's reporting systems has also been achieved. On a daily basis, performance can be checked to ensure all targets are being met. The data also provides automated and detailed invoicing reports for NYCC.

As an add-on to the existing handyperson process, the platform has allowed the development of an online stock control management system to provide up to date data on the equipment available and when stock should be ordered.

The use of the Firmstep platform achieved an immediate £8,000 saving as the service did not need to purchase a new case management module and licenses. As the processes are much more efficient this has freed up time that is enabling the Handypersons to undertake additional chargeable repairs.

The Future: The processes have proved so popular with the Service that they (with the guidance of the team) are now developing their own process for the referral and management of Disabled Facilities Grants.

Delivering a Multi-Agency Process

The Future: The multi-agency process within the Home improvement Agency clearly demonstrated that regardless of the in-house systems available, a common shared digital workspace for the delivery of specific tasks can be achieved efficiently with little cost to any organisation.

The team are now working on a more complex version of this to deliver a shared digital workspace to deal with the tasking of multi-agency teams working in King Street.