

SECTION A

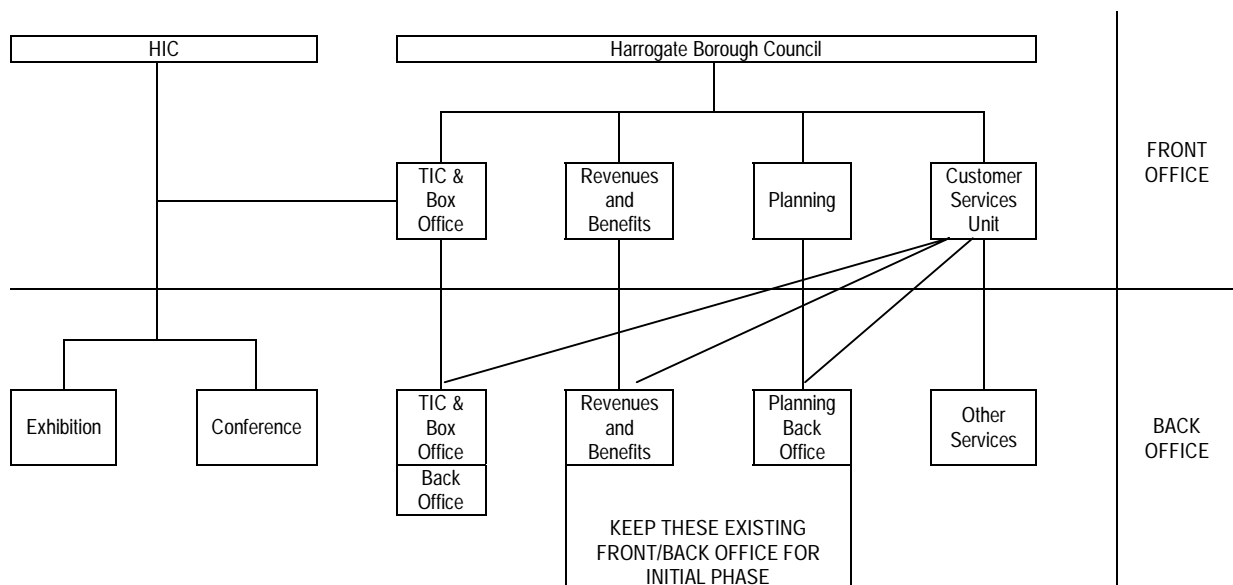
CORPORATE CUSTOMER SERVICE UNIT

A.1 The Access to Services strategy indicates that the corporate CSU will be responsible for dealing with all customer contacts in respect of the services connected to it. Initially this will be the Phase 1 services only but will develop over time to include all services not in Phase 1 apart from Revenues and Benefits/Planning. The service areas in Phase 1 are:

- Waste collection and recycling
- Cleansing of streets and open spaces
- Pest Control
- Parking services
- Highways and footpath maintenance
- Street Lighting

Not all of these service areas will go live from Day 1 and discussions are ongoing with the relevant Heads of Service as to the priority areas to be tackled initially.

The diagram below is extracted from the Access to Services Strategy and shows how it is anticipated that the CSU will link with other service areas and the front / back office split.



A.2 The CSU will also be responsible for the corporate switchboard, some telephony support tasks and the out of hours contact service (currently provided via the E team). The CSU will also be the corporate focus for customer related issues and the corporate management of the customer relationship management (CRM) and associated systems.

- A.4 As it is proposed that the CSU be located in Crescent Gardens and Knapping Mount and the staff will also provide the reception and visitor management service for both buildings. It is also intended to review security arrangements at Crescent Gardens as the number of personal visitors to the site is likely to increase.
- A.5 The roles and responsibilities are set out in detail below. These set out the long term aim for the unit, not all the functions listed will be provided from Day 1.

A.6 **Role**

Delivering first class public services

Delivering customer services

Deliver the Council's objectives in respect of Access to Services, Customer Care and Diversity Strategies.

Support organisational improvement through remodelling of business processes to improve efficiency.

Develop improved standards of customer care within the council and with partners.

Strategic management of customer relationships and focus for customer service issues.

A.7 **Responsibilities**

1. **Policy and service development**

To design and develop customer services that meet the needs of local residents, businesses, visitors and other stakeholders.

Lead corporate role in developing customer service policies and procedures.

Lead, develop and implement future phases of the Customer Service Project for front office services to transfer for delivery via the CSU.

Overall policy development for corporate call handling and voice communications.

Develop and continually improve knowledge base, including links to web site, FAQs etc.

Develop management information reporting to aid council services in improving customer services.

Play a leading role in change management and business process re-

engineering to achieve front/back office split and more efficient working.

Negotiate and agree SLAs with service providers and reflect these in the CSU work.

Work with key partners to improve customer services, access to services and efficiency.

Develop council wide customer standards and related PIs.

The development and application of policies and procedures in relation to the use of the IT and communication systems relating to customer management.

Contributes to effective management of customer information via web site.

Conducts regular surveys of customers and initiates follow up actions.

2. **Direct services**

Provide first point of contact resolution of 60% in Year 1 (rising to at least 80%) of customer contacts for those services connected to the CSU , including:

- Providing information
- Taking payments
- Booking a service
- Fault or defect reports

Pass accurate information to services in accordance with agreed timescales, format etc.

Provide corporate customer communications service including telephone contact service including the main switchboard service.

To deal with other customer contacts through a variety of contact channels including, telephone, face to face and written contact via the Council's web site.

Provide E team and Out of hours emergency contact service.

To provide support to civil and contingency planning function.

Work towards providing customer service at locations throughout the district, in partnership with statutory and voluntary sector partners. This will cover Harrogate, Ripon, Knaresborough, Boroughbridge, Masham and Pateley Bridge

Corporate management of complaints, including tracking progress and monitoring performance, including FOI requests.

Ensure systems and procedures comply with Data protection, Freedom of information, RIPA, DDA and other relevant legislation.

Negotiate and agree SLAs with service providers and reflect their service standards in the processes of the CSU.

Carry out regular communication with Heads of Service and their staff to ensure good communication and that customer services meet the service priorities.

To ensure good working relationships between the Front Office and Back Office staff, with regular two way communication.

Ensuring customers, staff and all stakeholders are kept informed on customer services, regularly consulted and involved in ensuring that standards are maintained.

Provide services that meet e-government priorities and targets, which are:

- joined up in ways that make sense to the customer
- accessible
- delivered or supported electronically
- delivered jointly
- delivered seamlessly
- open and accountable
- used by e-citizens

3. Systems and technical administration

To be responsible for the use and users of the CRM and telephone system as follows:

CRM

Business system Administration of the corporate CRM including:

- Creation and maintenance of users, security and access control.
- Configuration and updating of individual services/processes.
- Design, maintenance and modification of scripts.
- Archiving of records.

Specification, design and production of management reports from the CRM and related systems.

Performance monitoring across the whole system.

Maintenance of system test environment to ensure thorough testing before release into live environment.

Telephony

System administration of corporate telephone system.

The management and maintenance of all data relating to services, numbers and directories and their distribution via manual & electronic means.

The allocation & control of telephone extensions & numbers supplied with existing lines or new lines purchased by ITD.

Management & control of all facilities and restrictions available to users such as diverts, hunt groups, allocation of class of service & class of restriction, speed dialling, etc.

Management of Automated Call Distribution (ACD) control.

Management of Voicemail.

Management of the call management system.

The procurement, allocation and maintenance of all telephone equipment which is connected to the system via the wall sockets, including any related consumables.

4. Training and guidance

Liaison with Training & Development Manager to design and deliver corporate customer care training.

Training for users of the CRM software.

Promotion and effective use of CRM system features, giving guidance, advice and training for all users.

Promotion and effective use of telephone system features, giving guidance, advice and training for all users.

5. Working relationships

Will work with Cabinet/CMT on strategic customer service development.

Will maintain good relationships with Heads of Service on operational aspects of Customer Service delivery.

Will work closely with ITD on Access to services/e-government agenda as well as support and development of new technology.

Close links to DCPI to ensure effective contribution to corporate improvement agenda, key strategies and performance management.

Will engage with Councillors to ensure their requirements are met.

Will ensure effective links with partners including the voluntary sector.

A.8 OUTLINE OF STAFF ROLES AND RESPONSIBILITIES

Head of Customer Services

Overall responsibility for of implementation and further development of Customer Services (inc future phases of the CS project) and supporting technology to deliver the Council's objectives in relation to access to services, customer care and diversity.

Strategic management of customer service, including engagement with customers and partners.

Improving standards of customer service and supporting organisational improvement and efficiency through remodelling business processes and developing new ways of working.

Development of Corporate Customer Service Standards.

Operations Officer

Responsible for direct service delivery of all access channels and ensuring targets for dealing with customers at first point of contact are met.

Day to day running of Customer Service Unit and corporate telephone systems.

All aspects of staff management.

Training of all users of CRM and telephone systems.

Systems Support & Development Officer

Business system administration of corporate CRM and telephone system.

Ongoing development and maintenance service details and scripts in use in both CRM and voice technology.

Management reporting and performance monitoring.

User support.

Customer Service Advisor

Responsible for high standards of customer service and direct resolution at first point of contact of 60% (rising to at least 80%) of customer contacts, by telephone, in writing or face to face, using CRM, integrated telephony, web site, e-payments and other application systems to do so.

Ongoing liaison with services to maintain and further develop customer services.

Keeping up to date with council services and information.

Communications Assistant

Support for day to day management and administration of corporate telephone system.

Updating systems, records, notifying changes etc.

Administration of out of hours service, including liaison with service officers as required.

SECTION B

STAFFING/HR ISSUES

B.1 **Posts affected**

It is proposed that the work and development of the CSU will be brought in on a phased basis and that it will be staffed in accordance with the principles adopted during the recent corporate restructure. The posts whose work is to be transferred to the CSU have been identified and details are shown in exempt Appendix 1 to this section of the report.

B.2 **Communications**

Once the proposals are agreed a meeting will be held with the staff in these posts and the trade unions, so that they can be made aware of the proposals and how it will affect them. The process agreed for dealing with the staffing arrangements for this project will be explained to the staff so that they are fully aware of their position.

B.3 **Grading of Customer Service Advisors**

It is proposed that the posts of Customer Service Adviser (CSA) must all be graded the same if an agreed standard of service is to be provided to the public and in order to ensure consistent working practices. The new post of Customer Service Adviser will be the front line in respect of the Council's aspiration to resolve as many contacts as possible at first point of contact. The CSAs appointed in the first phases will need to understand and accept that the role will encompass the work and duties of all the phases when they are finally implemented. The grade of the new CSA post has been evaluated as Scale 4 and costs estimated on this basis.

B.4 **Role of Customer Service Advisors**

The CSAs will be expected to work on their own initiative, within the corporate guidelines and standards, to resolve customer contacts. They will be asked to undertake any work relating to providing an efficient and effective customer service role. The duties will be challenging and varied with a wide range of responsibilities. As the CSU develops, it is possible that their place of work could be anywhere in the district (including visiting people in their homes) and the hours of work may possibly include evenings and weekends. However, this will depend upon how the Council decides to implement future phases of the Access to Services Strategy and the availability of funding. Once fully trained, they will operate with minimal supervision. Transferring staff on different grades would, logistically, make it difficult to manage and provide a common service standard.

B.5 **Working hours**

The CSA posts will be required either now or in the future to work at specific times in order to satisfy operational requirements and customer demand. This could result in a variety of working hours and patterns (e.g.

8a.m.-2 p.m., 2 pm-6 pm) but they must be fixed. Only limited flexible working time is appropriate, this is in line with current practice in some areas.

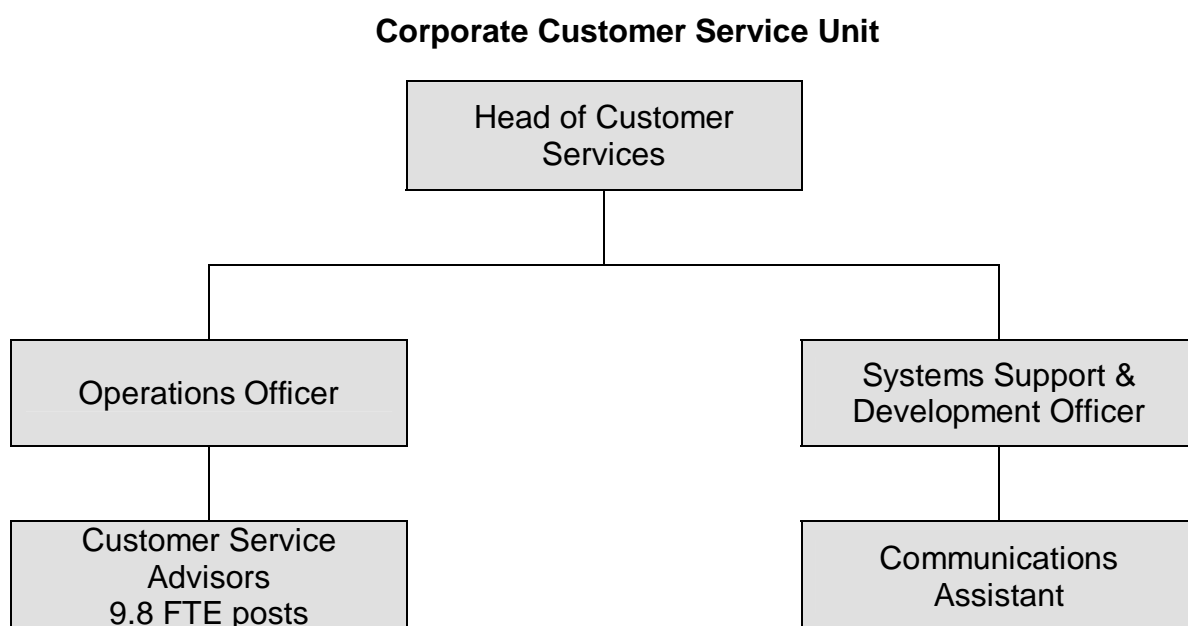
B.6 Staff numbers required

A detailed analysis of the volumes of work expected in Phase 1 has been undertaken based on current levels of telephone calls and face to face visits. There are a number of theoretical approaches to determining the number of staff required to deal with this workload which were examined by the AtS Board. The assessment is that 10 full time equivalent Customer Service Advisors are required to meet the Phase 1 workload of the CSU. Details of the calculations can be provided on request. The team will also comprise the Operations Officer, Systems Support & Development Officer, Communications Assistant and be led by the Head of Customer Services.

B.7 Training

It is essential that all the CSA's are given proper and comprehensive training to the same level and standard. It is also important to note that such training must be built into the timescales for the project, as the training will take some time to be delivered. This is essential if the CSAs are to provide the required standard of service. To enable such training to take place, consideration needs to be given to taking the appointed CSAs away from their day to day work prior to the effective operative date. This must happen since it will be essential to put the CSU team together and build them into one cohesive unit. However, this raises the problem of who will undertake the current work whilst the CSU is being formed. A balance needs to be struck between the creation of the CSU together with the need to provide training and maintaining the current level of service. The use of temporary staff may have to be considered.

B.8 Organisational Structure



SECTION C

SERVICE DELIVERY OPTIONS AND ACCOMMODATION

Service Delivery

- C.1 The Council's Access to Services strategy provides for a corporate CSU based in a Customer Service Centre in Harrogate. It also states that the Council will seek to provide suitably staffed Customer Service outlets in Boroughbridge, Knaresborough, Masham, Pateley Bridge and Ripon.
- C.2 It is suggested that the Council should define three types of customer service outlet:
- Customer Service Centre – providing a full range of face to face, telephone and email services initially, with written correspondence in the future.
 - Customer Service Desk - a staffed position, probably in partner's premises (eg Harrogate Library) providing face to face and telephone services.
 - Customer Service Point – a remote point access to Harrogate Borough Council services via computer and using the web site. May be in partner's premises with their staff available to provide assistance to customers (e.g. Boroughbridge or Masham Community office) and may also include video conferencing in the future.

The Council can work with partners and local people to achieve a consistent standard of customer service at these locations but must accept that there is likely to be a different solution in each area.

- C.3 Over the course of the project it is possible to develop the following:
- Corporate Customer Service Unit based at Crescent Gardens/ Knapping Mount dealing with telephone, face to face and written customer contacts.
 - Harrogate Borough Council Customer Service desk at redeveloped Harrogate Library providing face to face customer service with capability to deal with phone calls if time available.
 - Customer Service Centre in Ripon – either in partnership with NYCC in the Library or in the Town Hall.
 - Customer Service points in Boroughbridge and Masham Community Offices – working in partnership with the current occupiers of those premises.
 - Similar arrangements for Knaresborough and Pateley Bridge although no premises or partners have yet been identified
 - A remote mobile working capability so that staff can access the corporate systems from any location e.g. from a village hall or someone's home – this could facilitate a surgery type approach and may be useful to Elected Members or parish councils for example.

C.4 This report sets out the first stages to develop the CSU to provide telephone services for the whole district and face to face contact at Crescent Gardens and Knapping Mount. The revenue consequences of any future developments will need to be carefully assessed. Cabinet is requested to give their views upon future priorities for development of customer service desks and points across the district.

Accommodation

C.5 It is proposed to operate the CSU on a split site basis with staff based at both Crescent Gardens and Knapping Mount. This offers the most cost effective solution as it will accommodate the CSU staff who will provide the telephone service whilst still enabling the current level of face to face customer service and reception to continue to be provided at Knapping Mount. It provides for minimal alterations at Crescent Gardens to improve facilities for face to face customers so that people can conduct their business with some degree of privacy and comfort. It will also provide for self service access to the Council’s web site and access the internet if necessary.

C.6 As the Customer Service centre will be very visible it is essential that it meets current accessibility standards and gives a good impression to customers and visitors. It is suggested that any changes to the accommodation must take into account the need for improved security for the building, the management of visitors and customers and the health, safety and security of staff. A minimum cost option accommodation requirement to allow for the development of the CSU at Crescent Gardens and Knapping Mount has been established by the Department of Development Services. Summary details are given below.

Item	Estimated cost (£)
Relocation of staff in Crescent Gardens and removal of storage to Claro Rd site	2,400
Alterations to storeroom to provide new IT Training Room	8,000
Network cabling points and ceiling mounted projector for new IT Training Room	6,000
Minimal alterations to existing IT training room to house CSU staff	5,000
Minimal alterations to Crescent Gardens Foyer ie electrical power point/lighting location	10,000
Provisional cost to minimise design/fitting out including for example furniture, privacy screens to provide customer booths, retaining existing counter etc	50,000
Minimal Adaptations to Knapping Mount - provisional sum	12,000
Architect’s Design Fees	3,000
Contingency Sum	5,000
Total	101,400

It should be noted that these costs are provisional until more detailed plans of the alterations for the Crescent Gardens foyer are prepared. No costs for

alterations to IT or telephony infrastructure or UPS (uninterrupted power supply) are shown as they will be taken into account as part of the main project.

SECTION D

CRM AND SUPPORTING TECHNOLOGY PROCUREMENT

- D.1 A detailed requirement specification was drawn up jointly by both councils and the invitation to tender (ITT) was issued on 3rd June 2005. A thorough four stage evaluation methodology was agreed by both councils and details are given in Appendix 1.
- D.2 Tenders were returned and opened by Craven DC on 27th June and a total of four responses the invitation to tender were received as follows:
- Civica Services/Onyx
 - Northgate
 - SCC/Lagan
 - Trustmarque/Metastorm

The responses to the ITT were evaluated by teams of officers from both councils using the pre-agreed model. The details of the results for each response are given in exempt Appendix 2.

- D.3 Two suppliers reached the final stages of evaluation and were invited in to give presentations of their product and demonstrate its capability to a wide range of staff from both councils. A team of staff also visited reference sites to see the software functioning in a live environment and obtain information from current customers.
- D.4 Finally, detailed discussions were held to clarify a whole range of business and technical issues in the responses to the ITT. An independent procurement consultant was employed to advise on this part of the process and assist with the clarification of prices. Both companies submitted best and final offers for their solution to meet the requirements set out in the ITT. These details were used in the final part of the evaluation process and the results are shown in exempt Appendix 3.
- D.5 This showed that Northgate Information Solutions should be recommended as the preferred supplier for both councils and both the companies were both notified of this recommendation on 19th August 2005. This recommendation is supported by the joint officer steering group of Harrogate BC and Craven DC and the Harrogate BC evaluation team.
- D.6 The total price for the software licences and consultancy are shown in exempt Appendix 4. The tender price is valid for 20 weeks from the date of submission, 13 November 2005, and this is why it is necessary to hold the Urgency Committee to agree to accept the tender from Northgate Information Solutions.

D.7 Detailed discussions are currently underway with the manufacturer of the Council's telephone system (Mitel) and a solution to meet the requirements of the CSU is being designed in liaison with the IT Networks Manager. Once complete this will be procured in line with the Council's normal procedures.

Craven and Harrogate Partnership CRM Procurement

Tender Evaluation Process

Tender evaluation will be in four stages:

Stage 1 Gateway Review

- (i) Affordability - Are any of the bids priced so high that they are unaffordable to both Councils, based on the individual Council prices?
- (ii) Functionality - Do both Councils agree that a proposed solution does not meet the fundamental requirements of the specification based on the responses contained in Appendix A, Section 7.2, Ref. TC2.
- (iii) Acceptance of G-CAT Special Terms - Does the tendered accept the Special Terms?

If both Councils agree that any tender is unaffordable or does not meet the fundamental requirements of the specification, or that it would not be appropriate to consider a particular tender because the tendered is unwilling to accept the Special terms, that tender will be rejected at this stage.

Stage 2 Short listing

This stage will be split into two sub-stages based on evaluations of:

- 2.1 Price
- 2.2 Quality of bid submission, which will be measured by an evaluation of:
 - i) Overall Approach (Appendix A, Section 7.2) (Weighting – 40%)
 - ii) Key Questions (Appendix A, Section 7.3) (Weighting – 40%)
 - iii) Response to Detailed Specification (Appendix F) (Weighting – 20%)

The top three tenders at the end of the short listing stage will then be invited to take part in the third stage of the evaluation.

2.1 Evaluation of Price

Prices will be evaluated based on the cost (including support costs) over 5 years, excluding VAT.

Tenders will be ranked according to the total price, with the individual tender totals converted into a score as a percentage of the lowest bid. Thus the maximum score is awarded to the lowest bid and other bids are scored in proportion to the lowest.

The calculation is: **Lowest Score/Tender Score x 100**

The result of this calculation is then multiplied by the overall cost weighting (30%) to arrive at a weighted cost score.

2.2 Evaluation of Quality

2.2(i) Evaluation of Overall Approach

This is measured via Appendix A, Section 7.2, refs TC1, TC3, TC4, TC5, TC 6 &7, TC8, TC9, TC10 and TC11, therefore the evaluation is based on a total of 9 "questions".

The response to each question will be scored according to the following system:

3 - Excellent response, 2 - Good Response, 1 - Poor Response, 0 - Unacceptable Response

The total score (max. possible 27) will then be calculated and applied to the following scale to determine the overall criterion score:

Individual "Overall Approach" Score	Overall Performance	Overall Judgement	Overall Score
24-27	Meets the criteria in full	Excellent	5
19-23	Mainly meets the criteria	Good	4
14-18	Meets more than fails the criteria	Fair	3
9-13	Fails more than meets the Criteria	Doubtful	2
4-8	Mostly fails the criteria	Poor	1
0-3	Completely fails the criteria	Unacceptable	0

2.2(ii) Evaluation of Key Questions

This is measured via Appendix A, Section 7.7, refs TD1 to TD23

The responses to the questions will be scored in accordance with the same system as used in evaluating the overall approach with each key question being weighted.

The individual scores (between 0 and 3) will be multiplied by the weightings and the results totalled to produce a total score (max. possible 156), which will then be applied to the following scale to determine the overall criterion score:

Individual "Key Questions" Score	Overall Performance	Overall Judgement	Overall Score
131-156	Meets the criteria in full	Excellent	5
101-130	Mainly meets the criteria	Good	4

78-100	Meets more than fails the criteria	Fair	3
51-77	Fails more than meets the Criteria	Doubtful	2
26-50	Mostly fails the criteria	Poor	1
0-25	Completely fails the criteria	Unacceptable	0

2.2(iii) Evaluation of Response to Detailed Specification

It is anticipated that most tenders will meet the vast majority of the detailed specification requirements and therefore the judgements related to this aspect of the evaluation will be based on the aspects of the specification which tenders have indicated are not fully met by their proposal.

The scoring will be based on the following scale:

Overall Judgement on how well Specification has been met	Overall Score
Excellent	5
Good	4
Fair	3
Doubtful	2
Poor	1
Unacceptable	0

Evaluating Overall Quality

The Quality scores will then be multiplied by the weighting to produce a weighted score, and the total weighted score calculated. A similar process would then be followed to the scoring of the price, however in this case the ranking would be with respect to the highest score, not the lowest.

The calculation would be **Tender Score/Highest Score x 100**

The final part of this short listing stage is to choose the up to three tenders to invite to take part in the stage 3.

Showstoppers

If, during the course of the stage 2 evaluation, it becomes clear that a proposed solution does not meet the fundamental requirements of the specification, or that the solution imposes an unsustainable restriction in terms of usability, infrastructure requirements, or the use of other software systems, then the tender may be rejected at this stage, subject to agreement by both Councils.

Stage 3 Practical Evaluations

The proof of concept and reference site evaluation will be based two evaluation teams representing Harrogate Borough Council, and Craven District Council. The two evaluation teams will evaluate the responses to the criteria agreed between each council including demonstrating the mapping of processes outlined in Appendix E of the ITT, and response to agreed questions.

3.1 Evaluation of Proof of Concept

The responses to the processes and evaluation questions will be scored in accordance with the same system as used in evaluating the overall approach with each question being allocated a weighting.

The individual scores (between 0 and 3) will be multiplied by the weightings and the results totalled to produce a total score (max. possible 234) that will then be applied to the following scale to determine the overall criterion score:

Individual “Proof of Concept” Criterion Score	Overall Performance	Overall Judgement	Overall Score
200-234	Meets the criteria in full	Excellent	5
160-199	Mainly meets the criteria	Good	4
120-159	Meets more than fails the criteria	Fair	3
80-119	Fails more than meets the Criteria	Doubtful	2
40-79	Mostly fails the criteria	Poor	1
0-39	Completely fails the criteria	Unacceptable	0

Each council’s proof of concept score will then be multiplied by the weighting to produce a weighted score, and the total weighted score calculated.

3.2 Evaluation of Reference Site Visits

The evaluation questions used during the reference site visits will be scored in accordance with the same system as used in evaluating the overall approach with each question being allocated a weighting.

The individual scores (between 0 and 3) will be multiplied by the weightings and the results totalled to produce a total score (max. possible 363) which will then be applied to the following scale to determine the overall criterion score:

Individual “Reference Sites” Criterion Score	Overall Performance	Overall Judgement	Overall Score
300-363	Meets the criteria in full	Excellent	5
241-299	Mainly meets the criteria	Good	4
181-240	Meets more than fails the criteria	Fair	3
121-180	Fails more than meets the Criteria	Doubtful	2
61-120	Mostly fails the criteria	Poor	1
0-60	Completely fails the criteria	Unacceptable	0

Each council’s reference visit score will then be multiplied by the weighting to produce a weighted score, and the total weighted score calculated. An average

score for each Supplier will then be calculated using the councils' individual total scores.

Stage 4 Final Evaluation

At this final stage, all the evaluations for the short listed tenders will be drawn together to formulate an overall score for both perspective councils.

The evaluation will bring together the following criteria results:

Quality (70%)

Proof of Concept
Reference Site Visits

Price (30%)

Best and final offer

4.1 Best and Final Offer (BAFO)

Prices will be evaluated based on the cost (including support costs) over 5 years, excluding VAT.

Tenders will be ranked according to the total price, with the individual BAFO converted into a score as a percentage of the lowest price. Thus the maximum score is awarded to the lowest bid and other bids are scored in proportion to the lowest. The calculation is: **Lowest Score/Tender Score x 100**

The result of this calculation is then multiplied by the overall cost weighting (30%) to arrive at a weighted cost score.

4.2 Quality Criteria

The Quality scores will then be multiplied by the weighting to produce a weighted score, and the total weighted score calculated. A similar process would then be followed where ranking would be with respect to the highest score, not the lowest. The calculation would be **Tender Score/Highest Score x 100**

4.3 Final Evaluation Results

Simply adding the weighted scores for price and quality together then completes the overall evaluation:

Harrogate BC Evaluation Teams

Stage 1 – Gateway review

Steve Metcalfe, Paula Newson Smith

Stage 2 - Shortlisting

Paula Newson Smith, David Ashwell, Chris Rymer, Christine Pyatt, Suzanne Burniston, Steve Metcalfe

Stage 3a – Proof of concept

Christine Pyatt, Jane Wood / Sandra Martin, David Clothier, Nick Pilkington, Susan Gill, Suzanne Burniston, Rob van Tol, David Ashwell, Chris Rymer

Stage 3b – Reference sites

Paula Newson Smith, Christine Pyatt, Jane Wood, Suzanne Burniston, Steve Caisley

Stage 4 – Final assessment

Paula Newson Smith, Chris Rymer, Christine Pyatt

SECTION E

IMPLEMENTATION

- E.1 Once the decision is made to confirm Northgate as the preferred supplier then the Council's Legal team will finalise the contractual issues required under G-CAT. A detailed statement of work has been prepared and will form part of the contract with Northgate. The acceptance test regime, critical success factors, resources required from the council's side and ongoing support service will also be finalised at this stage.
- E.2 This procurement differs from many in that the Council is not just purchasing hardware and software licences but is buying the potential to completely change the way in which it operates internally and the way services are delivered to customers. A key part of this is the ongoing relationship with the supplier, the upgrade path for the product and the effectiveness with which the skills transfer can take place from the supplier to the council's staff.
- E.3 The implementation will take place in a partnership between Northgate and the Council. The supplier will provide the following expertise at various stages throughout the life of the project:
- Project Manager
 - Solution Architect
 - Business consultant
 - Technical consultant
 - Integration consultant

The supplier has conducted many such implementations in the past and therefore will provide the necessary knowledge and support to the Council. The transfer of key skills to council staff will also take place as part of the project so that the CRM solution can be maintained and developed in house in the future.

- E.4 Typically once the project plan has been agreed between the supplier and the council there is a four stage process as follows:
- Project launch and system build
 - Data take on
 - Telephony integration
 - Develop services and interfaces

This can take as little as 16 weeks from initiation but is dependant upon the level of resources available within the Council and availability of the supplier's team.

- E.5 The site licence option for the CRM and workflow offers better value for money if purchased at this time and also has the potential for significant efficiencies to be achieved in the way services operate at a detailed level. The software can also be used in future to improve and streamline internal customer relationship management and processes.

BUSINESS PROCESS CHANGE AND THE BACK OFFICE

- E.6 A key part of the Customer Service Project is to re-engineer current ways of working at a detailed process level. It is this part of the project that will allow the split between the front and back office to take place and also where efficiencies and improvements will be realised. A separate sub group of the project was set up to focus on this area of work. However, before it can progress as part of the CRM implementation the staff who will be undertaking key roles in the future have to be identified.
- E.7 The CRM supplier will provide consultancy and advice to the Council as part of the implementation of Phase 1. They will also train the Council's staff during a process of skills transfer so that we are able to manage and sustain the change process in the future.
- E.8 It is recognised that a number of staff affected by these changes also carry out other tasks. Just as different job roles will be created in the CSU, so the job content of staff in the back office will change. It is important that this is dealt with as part of the project and it is likely that minor restructures will be necessary in the back office as services transfer to the CSU.