

**Note to:** Improvement Board  
**From:** Jane Salt / Richard Quayle  
**Date:** 4 November 08

## **T-Enabling Update**

**Purpose:** To update Improvement Board on the progress of T-Enabling blueprint development and associated projects.

**Update:** T-Enabling Blueprint

Heads of Service have been asked to consult key staff on suitability of blueprint:

- So far feedback has been received from Customer Services, IT, Performance Improvement, Communications and Building Control.
- Feedback has generally been positive. Main concerns raised so far are:
  - Whether all initial customer contact should go through Copeland Direct
  - Who should own 'Engagement'
- IT is investigating technical options along with associated approximate costs for delivering the blueprint.

JS and RQ will be arranging meetings to discuss the blueprint with relevant managers.

### Web Project

- A user group has been set up and meets fortnightly. W/c 13-Oct-08 the user group met to review web page template / homepage designs.
- The purchase of a committee minutes system has been agreed following a site visit to South Lakes DC. This will improve searching, monitoring and management of minutes, agendas, part II documents and Councillor Attendance. It also publishes information to the website.
- A temporary member of staff is being recruited for 3 months to transfer historical information onto the new committee minutes system.
- Services offered by Copeland Direct on behalf of departments are being reviewed to see how suitable they are for self service on the website via on line forms that will feed directly into the CRM. Proposed list will be drafted by end of October. Discussions will then take place with managers.
- Capita have given a presentation on their online self service modules for Council Tax, NNDR, Benefits and Landlord Access, E-Citizen. Work is being carried out to understand whether there is a business case to justify the cost of these modules.
- Steve Brailey from Allerdale is supporting the project by meeting fortnightly to review plans and progress.

### Complaints System

- Covalent have given us access to their complaint system until the end of November (without cost) to test it and see if it is fit for purpose.
- Complaints staff carried out a site visit to South Lakes on 9<sup>th</sup> Oct.
- If we decide to purchase Covalent Complaints system it will cost £3.5k and annual support charge of £875

### NI 14

- National Indicator 14 (recording whether customer contact was avoidable) is to start being recorded October 08.
- Audit Commission have confirmed that we can use the CRM to record avoidable contact (understanding that not all phone calls etc will be recorded on it so will be a

sample). For channels that do not go through the CRM / Copeland Direct a manual sampling survey will take place in departments.

- Project Team have been working with CGI (CRM suppliers) to enhance the CRM to capture NI 14 information.
- CRM has been developed and is ready to be tested.
- Once NI 14 CRM enhancements have gone live Project Team will be working with departments to arrange manual sampling for remaining channels.

#### CRM

- Telephony suppliers are coming onsite to demonstrate available enhancements for us to better understand benefits.
- Research is starting to be carried out into affordable document management systems along with integration opportunities.
- Research is starting to be carried out into affordable technical solutions offering functionality to integrate CRM with relevant back office systems.
- Favourite two suppliers for the Building Control / Planning / Land Charges replacement system are both able to interface with the CRM.