

Board(s):	Date(s):	Item no.
IS Sub Committee	21 st January 2014	
Subject: IS Strategy – Implementation Update	Public	
Report of: Chief Information Officer	For Information	
<u>Summary</u>		
Background		
<p>The IS strategy seeks to address how we can best exploit the power of technology – both new and existing systems and practices - to achieve the business objectives of the City Corporation.</p> <p>After extensive research and consultation with the IS Sub Committee, Chief Officers, Managers, and all Departments in the early part of 2013 the IS strategy was approved by the IS Sub Committee at the 18th of June 2013 meeting. Since then work has been progressing on both the enabling works (IS Reorganisation and Sourcing Review) and the projects and programmes which will deliver the Strategy.</p> <p>The Strategy comprises four key Programmes and this report provides a summary of each, setting out the business objectives, the key projects and the progress made in defining and delivering these.</p>		
Recommendation		
Members are asked to:		
<ul style="list-style-type: none"> • Note the Report and the current position of each Theme. 		

Main Report

Background

1. The Corporation's IS Strategy was renewed through a series of consultations in late 2012 through to June 2013. Stakeholders involved in this process included Members, Chief Officers, Managers and staff from a wide range of departments.
2. The results of these consultations guided the development of the new IS Strategy, which was approved by the IS Sub Committee in June 2013 with a further action to review progress in 6 months.
3. The Strategy comprised 4 Themes, namely:
 - a. Better Working Practices
 - b. Building an Effective Corporation
 - c. Customer Access and Strategy
 - d. Promoting the City
4. Each theme is at a differing stage of development; some with clear projects defined and in the course of being delivered, others with business objectives defined but more work is required to define, cost and approve the detailed projects. The position of each Theme is detailed in the following sections.
5. Concurrent with the progress made on the delivery of the IS Strategy a number of enabling works have been undertaken, namely the IS Sourcing Review and the Reorganisation of the IS Department.
6. The Sourcing review is now complete with Agilisys appointed as our strategic partner in Sept 2013 and with the completion of the Transition Period in Dec 2013 Agilisys are now responsible for all aspects of the provision of our IS Services. Additionally, Agilisys are providing more strategic support to the delivery of the IS Strategy across a number of the Themes.
7. The IS Reorg is also complete and came into effect in September 2013, however a number of key posts have proved challenging to fill due to a competitive market for quality IS staff. A major step forward has been made with Avril Stokes joining the Corporation on the 6th of January, as our new Assistant Director for Portfolio and Change Management. However, a number of key posts in the CTO area, around vendor management and Enterprise Architecture, remain vacant. After 6 months of unsuccessfully recruiting for these posts, we are currently reviewing the best way forward.

Current Position

8. A summary of each Theme is given below and the current status in each Theme is set out in Appendix 1 in a series of "one-pager" summary documents.
9. **Better Working Practices**

- a. **Intranet and internal digital strategy: 'One Corporation'**: improve and develop intranet access across the City Corporation in line with 'one Corporation' vision of consistent user experience and system access for all; improve appropriate internal social media to enable knowledge and resource sharing via SharePoint, provide easy access to business tools and intelligence 'dashboards' to support better working practices. Provide clear and accessible policy and guidance to enable staff to securely and productively exploit such tools; develop and recommend 'digital engagement' approach for staff to stay across pace of system development.

Status – Project start and definition approved at IS Strategy Board (ISSB) on the 5th December. Final costs and programme will be subject to further approvals. Project to improve SharePoint performance will start in January.

- b. **Mobile and Remote Working**: explore and recommend appropriate devices, their use and deployment to support an 'everything anywhere' approach. Improve user experience, sign-in process, system capability, resilience and access whether working remotely or at a fixed location. Work with internal partners (HR, Communications) in developing clear and accessible policy, guidance and best practice for remote and mobile working.

Status – Project approved at ISSB (5th December). Project to improve remote access experience, and range of services starts in January. Broader implementation plan is currently in development.

10. **Building an Effective Corporation**

- a. **System consolidation and rationalisation**: reduce complexity and duplicity across multiple systems carrying similar data (such as flexitime systems) in order to achieve 'one version of the truth' to benefit of staff and customers. Rationalise and consolidate systems to reduce overhead costs of support, maintenance and effort of staff entering similar data from various departments.

Status – Project approved at ISSB (18th November), pending resource allocation to start project.

- b. **Oracle ERP and Business Intelligence**: Primarily to improve access and delivery of business intelligence via 'single system' for finance and property information. This mitigates 'immediate' risk associated with out of date systems, consolidates and rationalises business process & reporting for managers, and releases managers to focus on decisions based on 'true' data rather than 'piecemeal' data from various routes. In time, explore linkages of finance and property information to other key business data such as HR, payroll etc. in order to provide a full and financial picture of our workforce. Provide clear and accessible 'dashboards' of relevant data for managers as appropriate to aid operational and workforce planning.

Status – Project approved through Finance Committee (19th November) and Project Sub Committee (5th December). Project starts Monday 13th January 2014.

11. **Customer Access and Strategy**

- a. **Customer Relationship Management (CRM) system:** exploring key areas for data improvement, analysis of priority service lines and cost/benefit analysis around linkages with Joint Development Partnership (JDP)

Status – Project to develop strategy approved through ISSB (5th December), pending funding approval to confirm start.

- b. **Website and transactions:** explore and develop potential for digital platforms to serve our customers building on the current Contact Strategy and 'Digital First' aspiration of self service, issue reporting at first point of contact etc. Includes further research and workshops into service use, customer profiles, potential and recommendations for appropriate 'channel shift' and business intelligence.

Status – Project approved through ISSB (18th November), data collection and analysis in progress; timeline developed and regular reviews scheduled. Data review to be completed by 31st January.

12. **Promoting the City**

- a. A separate report has been provided detailing work underway with the Economic Development Chief Officer Group (EDCOG) and the City Surveyor's Dept., to develop a Telecommunication Strategy for ubiquitous high speed wired and wireless connectivity for all City Stakeholders.

Status – Initial report to be provided to EDCOG for end of January 2014.

Next steps

13. The next steps for each Theme are set out in the summary documents contained in Appendix 1.

Conclusion

14. Following the contract start in September, a period of service transition has been successfully completed, and the full operational service is now managed by Agilisys.

Appendices

- Appendix 1 – Theme "One Pagers"

Background Papers:

Information Systems Sub (Finance) Committee – 18th June 2012
IS Strategy 2013 - 2018.

IS Strategy Theme – Better Working Practices

Programme	Intranet & Digital Engagement (Strategy & Implementation)	IS Lead	Graeme Q-P	Status	Plan & Build
Background	<p>It is generally perceived that the current Intranet is in need of a range of improvements, to improve access to information. However, the design of the Intranet is still largely static – requiring users to find what they need rather than provide it to them. It therefore does not provide a focal point for users to allow them to access business systems and manage their key activities and is designed around the Corporation rather than the person.</p> <p>Access for the Institutional departments is very limited, and does not encourage a ‘One Organisation’ culture.</p> <p>Wider and deeper use of the Intranet, as a corporate tool, would support the delivery of process efficiencies in key service areas.</p> <p>Use of Social Media internally has involved the use of Yammer on a standalone basis. A Digital Engagement strategy is required to understand how we can develop this area, and provide facilities that would support better working practices within the organisation.</p>				
Project Objectives	<ol style="list-style-type: none"> 1. To deliver strategies for the Intranet and Digital Engagement that; <ol style="list-style-type: none"> a. Make the Intranet the focal point for users by providing easy access to information, tasks, and applications based on role & relevance to user. b. Support better working practices through improved access and search to policies & guidance, key corporate information & messages, and business information & knowledge. c. Optimises the delivery of SharePoint capabilities by enabling access from one place, supporting Collaboration, and information exchange across the organisation. d. Support complimentary projects for Mobile & Remote Working by optimising the Intranet for access away from a fixed desk. 2. To present recommendations for the establishment of guidelines, rules and processes to support the implementation of both strategies. 3. To provide proposals for the implementation of both strategies. 				
Work Streams					
<ol style="list-style-type: none"> 1). Technology <ul style="list-style-type: none"> • Review existing capability and identify options for new technology if any gaps exist. • Understand data and system ‘linkages’ between key information. 2). Information & Policy <ul style="list-style-type: none"> • Review existing capability as a repository of business information and knowledge. Review existing data assets (e.g. telephone directory, news feeds) • Work with internal partners to ensure approach is aligned with corporate and ‘people’ strategies and refresh/ develop training, policies, guidance in relation to ‘digital/platform engagement’ 					

- Develop and recommend an initial 'digital engagement' approach: then evolve into policy/framework, illustrating business benefit to all areas.
- Research 'in flight' and existing 'dashboard' intelligence provision and scope how (and when) this can be aggregated into developed intranet front page (dependent on progress with Business Intelligence project)
- Research other organisations digital engagement/collaboration strategies.

3). People & Process

- Research, define and scope staff platform requirements; e.g. manager profile information (budgetary, people etc.)
- Work with HR/ key internal partners to understand and recommend how and what business intelligence provision fits with future corporate strategies (e.g. culture)
- Develop content approval process
- Establish Super users and security roles
- Update training materials and courses

4). Design & Implementation

- Redesign look and feel of intranet pages, appearance and enhance homepage
- Redesign site map navigation
- Migrate existing content
- Generate new content

Initial Costs	Definition of strategy to be met from existing budgets (use of existing staff resources). Implementation costs to be determined.
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Key Milestones		
#1	Intranet Strategy delivered for ISSB review & approval	End of Q1 2014
#2	Intranet Implementation Proposal for sign-off	During Q2 2014
#3	Digital Engagement Strategy delivered for ISSB review & approval	End of Q1 2014
#4	Digital Engagement Implementation proposal for sign-off	During Q2 2014

Dependencies
1. Board and partner agreement of suggested approaches (stakeholder buy-in)
2. SharePoint wider rollout and rebuild (underlying technology platform) – Q1/2 2014
3. Wide Area Network Project (reliable performance for all sites) – end Q1 2014
4. Federated Domains Project (access for whole organisation) – end Q1 2014
5. Business Intelligence Project (access to information) – to be confirmed
6. Document Management & Collaboration project (ability to find and share information) – to be confirmed
7. Move to IaaS Cloud-based infrastructure (core infrastructure) – Q4 2014

Decision
1. The outcome of the Intranet Strategy work should precede any redevelopment & redesign of the current Intranet.

Governance
1. Technology – IS Management
2. Information & Policy – IMGGB, other policy groups as identified during project
3. People – ISSB, HR

IS Strategy Theme – Better Working Practices

Programme	Remote & Mobile Working	IS Lead	Graeme Q-P	Status	Plan & Build
Background	<p>Remote Working to date has focussed on the provision of secure network access, typically for staff working from home on an ad-hoc basis. The technology used to manage this (Citrix) has also been used to provide access to many offices - Open Spaces, Ports, etc. Although Citrix permits a high level of control, it is perceived by many users as awkward and unreliable.</p> <p>The number of concurrent users of Citrix is limited, and as the recent severe storm demonstrated, this restriction prevented users from working from home. Although this sort of event is exceptional, it is clear that a solution is required that provides convenient and easy access and has sufficient capacity to cope with more users working at home.</p> <p>Solutions for Mobile Working have tended to be based on a variety of devices, with BlackBerry being the dominant solution. More recently iPads have been issued to Members and senior officers. Access to corporate systems and data via mobile devices is limited to email/calendar and web browsing, which limits the benefits of such devices.</p> <p>Maintaining compliance with security using the existing solutions constrains ease of use (need for passwords and device restrictions) and at the moment restricts access to business applications and data.</p>				
Project Objectives	<p>1. To support and enhance flexible working, and enable staff to securely access key information away from the desk. This will enable;</p> <ul style="list-style-type: none"> • An everything anywhere approach to access to business applications and data, supporting a range of devices. • An improved user experience when signing –in and a better choice of access to email that suits a user’s need. • More effective capability for events affecting travel to/from main offices. • Better use of accommodation through supporting access to systems away from a fixed-desk. 				
Scope/Work Streams					
<p>1). Technology (Remote)</p> <ul style="list-style-type: none"> • Replace out-dated infrastructure • Roll-out remote-friendly versions of MS Outlook • Roll-out use of secure methods of access to the network that balance risk against ease of access (subject to PSN) <p>2). Policy (Remote)</p> <ul style="list-style-type: none"> • Review and amend existing security and use polices as required by outcomes of technology trials • Review, amend and gain agreement on existing polices and guidance for flexible working and other related policies. 					

- Provide appropriate guidance and training materials to support effective use of enhanced technology and access methods.

3). People

- Identify channels to promote awareness and use of tools
- Provide appropriate support and training to promote take-up

Initial Costs | To be determined

Key Milestones

#1	Sign off of Technical Proposal from Agilisys (Remote Working)	Nov 2013
#2	Delivery of new Remote Working solution	March 2014
#3	Capture of Mobile Working requirements	Q1 2014
#4	Sign off Technical Proposal from Agilisys (Mobile Working)	t.b.d
#5	Delivery of new Mobile Working solution	t.b.d

Dependencies

Implementation of Mobile Device Management Tool (device support) - TBC
 Mitel and Lync Integration (remote/mobile telephony) – September 2014
 Replacement of Corporate Firewalls (security management) – June 2014
 Review/Replacement of 2 Factor Authentication (identity management) – July 2014
 Upgrade CoL WiFi (connectivity) – September 2014
 Compliance with PSN code of connection

Decision

To agree the prioritisation of improved remote working capabilities.
 Once these are in place work with business to define and implement initial mobile working solution, focusing on areas of highest need.

Once solutions are in place, actively promote the adoption of flexible working practices throughout the organisation.

Governance

1. Technology - IS project review meetings, ISLOG sub-group
2. Policy – HR (Establishment Committee if required) and reports to ISSB and ISLOG
3. People – HR business partners (supporting adoption in departments) and Training

IS Strategy Theme – Better Working Practices

Programme	SharePoint Expansion	IS Lead	Graeme Q-P	Status	Plan & Build
Background	<p>The current internal SharePoint platform is running at a version no longer supported by Microsoft, and cannot be scaled to meet future needs. Users have reported a number of issues with the system including poor reliability and slow performance.</p> <p>There is strong demand for wider deployment of the business facilities that can be provided by SharePoint. Previous attempts at defining a strategy for expanding use and governing use have not resulted in delivery beyond a few 'pilot' solutions.</p>				
Project Objectives	<ol style="list-style-type: none"> 4. To deliver a strategy for the expansion of SharePoint that; <ol style="list-style-type: none"> a. Enables wider use of Team Sites for improved Collaboration within the organisation and supports effective use. b. Describes the approach to consolidate delivery of management information dashboards and the delivery of Business Intelligence across corporate systems (supporting the ERP project). c. Outlines the approach for case-by-case use of SharePoint where an alternative is available within an existing business system. d. Provides Document and Records Management capabilities and Governance tools for managing information assets e. Exploit the Workflow capabilities within SharePoint to underpin efficient use of the facilities provided. f. Leads to the replacement of existing shared drives. 5. To present recommendations for the establishment of Governance guidelines, rules, processes and training, to support the implementation and on-going management of the aims of the strategy. 6. To provide proposals for the implementation of the strategy. 				
Work Streams					
<ol style="list-style-type: none"> 1. Rebuild & Stabilise <ul style="list-style-type: none"> • Maintain support compatibility and improve performance. Foundations for expansion. 2. Definition <ul style="list-style-type: none"> • Consult, review and define strategies 3. Communication <ul style="list-style-type: none"> • Promotion and engagement to support take-up 4. Implementation 					
Costs	<ol style="list-style-type: none"> 1. To be confirmed 2 & 3. To be met from existing budgets (use of existing staff resources) 4. To be determined based on the outcome of the strategies. 				
Key Milestones					
1	Rebuild existing (internal) SharePoint platform				End Feb 2014
2	SharePoint Expansion Strategy delivered for review & approval				Q1/Q2 2014

3	SharePoint Implementation Proposal for sign-off	Q1/Q2 2014
4	SharePoint Governance Strategy delivered for review & approval	Q1/Q2 2014
5	SharePoint Governance Implementation proposal for sign-off	Q1/Q2 2014
Dependencies		
<ul style="list-style-type: none"> 8. Board and partner agreement of suggested approaches (stakeholder buy-in) 9. Wide Area Network Project (reliable performance for all sites) – end Q1 2014 10. One Corporation Project (access for whole organisation) – end Q1 2014 11. Business Intelligence Project (access to information) – to be determined 12. Infrastructure Migration (provision of core infrastructure for cost effective use) – Q4 2014 		
Decisions		
<ul style="list-style-type: none"> 1. A rebuild of the existing internal SharePoint platform will require a freeze on any SharePoint related development for approx. 3 months. 2. Before the expansion of facilities to support collaboration and document management it is essential that appropriate governance is in place to ensure efficient use. 		
Governance		
<ul style="list-style-type: none"> 1. Expanded use of SharePoint – ISSB 2. Governance – IMGB, other policy groups as identified during project 		

IS Strategy Theme - **Building an Effective Corporation**

Title	Enterprise Resource Planning (ERP) & Business Intelligence (BI)	IS Lead	Milan Gudka	Status	In flight
Background	<p>ERP is a cross-functional corporate system driven by an integrated suite of software modules that supports the basic internal business processes of a company. ERP gives a company an integrated real-time view of its core business processes such as finance property management, and inventory management, tied together by ERP applications software. Though a single ERP system can meet the holistic needs of an organisation, it is possible and common to run multiple systems joined-up to a single larger ERP system to gain the same benefits.</p> <p>BI is a set of processes and technologies that transform raw data into meaningful and useful information for business purposes. This raw data can be from different sources i.e. different departments and systems and can be presented in a multitude of easy customisable dashboards and reports.</p>				
Project Objectives	<ol style="list-style-type: none"> 1) Mitigate risk of existing systems which are out-dated and carry operational risks and inefficiencies – CBIS and Manhattan. 2) Consolidation/rationalisation, streamlining of business process for financial management to improve efficiencies, improve customer service and reduce costs of financial management, which will lead to huge positive business change. 3) Ensure there is one version of the truth by standardising reporting and the data behind it. 4) Let managers manage rather than spending time creating and manipulating reports by implementing a standardised approach to Business Intelligence. 5) To enhance the effectiveness of decision making at the City of London Corporation through the creation of a portal which provides relevant, timely, accurate and comparable information. 				
Work Streams / Scope					
<ol style="list-style-type: none"> 1) Finance & Property <ul style="list-style-type: none"> ▪ Upgrade of CBIS and replacement of Manhattan to Oracle R12 ▪ Rationalise reporting across financials and property ▪ Outsource the associated managed service 2) Business Intelligence <ul style="list-style-type: none"> ▪ Reporting portal for finance & property as part of Oracle R12 upgrade ▪ Reporting dashboard for Culture Heritage & Libraries (CHL) ▪ Corporate review of BI requirements in conjunction with SharePoint strategy 3) HR <ul style="list-style-type: none"> ▪ Current Systems and Process review ▪ Integration of HR, Payroll and financials 					
Costs					
Key Milestones					
#1	BI Dashboard for CHL				Q2 2014
#2	HR ERP project scope validation and approval				Q2 2014

#3	Gateway 2 approval for Corporation wide integrated BI solution	Q2 2014
#4	CBIS upgraded to Oracle R12 and BI reporting	Q4 2014
#5	Manhattan replaced with Oracle Property Manager and BI reporting	Q4 2014
Dependency		
Agreed date for SharePoint rebuild as both cannot be done in parallel.		
Programme Governance Board		
ERP Steering Group & ERP Project Board		

IS Strategy Theme - **Building an Effective Corporation**

Title	System Consolidation/Rationalisation	IS Lead	Milan Gudka	Status	Pipeline
Background	<p>There are in excess of 80 bespoke developed applications/systems and over 200 off-the shelf applications being used at the City of London. Some of these have been developed decades ago and some more recently, through individual or departmental requests, without review of what may already be available.</p> <p>This means that there are multiple versions/instances of some applications and some applications do similar things; eg, Flexitime is used for recording holidays and so is iTrent and consolidation often gives different results. There are also different versions of Flexitime as they have been requested by different departments at different times. Also the City of London Police have their own HR system called Origin, whilst iTrent is used elsewhere.</p>				
Project Objectives	<ol style="list-style-type: none"> 1) To ensure there is single version of the truth, increase the use of corporate systems (ERP, CRM, SharePoint) to make increased use of system for reporting, single view of customer, etc . 2) Reduction in the complexity in using multiple applications to get parts of the jigsaw. 3) Rationalise and/or consolidate identified bespoke systems to remove overhead of support, maintenance and redirect IS resource to focus on delivery of key projects especially in light of the inflight / pipeline projects to implement Corporate systems – not all bespoke applications will be removed. 4) To help drive efficiencies and remove duplication and overhead for staff, standardise and simplify the suite of bespoke applications. 5) Establish Policy document with roadmap outlining what the department application suite consists of, working in conjunction with the departments. 				
Work Streams / Scope					
<ol style="list-style-type: none"> 4) Review of current systems <ul style="list-style-type: none"> ▪ Discovery – working with the departments identify how many, their use (transactions, contract end dates, number of transactions, type of customers), and owner of the cost of support 5) Options Evaluation <ul style="list-style-type: none"> ▪ Identify applications to be removed and applications that can be consolidated from and to ▪ Which applications can use CRM, website (e-forms), Oracle ERP ,Corporate systems ▪ Agreement with departments on the plan/roadmap for consolidation of applications, including associated costs 6) Support Arrangements <ul style="list-style-type: none"> ▪ Process ▪ Options to support Outsource/in-house/mix of services ▪ Handover documentation 7) Policy document <ul style="list-style-type: none"> ▪ Guidance on applications, use of Corporate systems 					

- Procurement restrictions in place

Key Milestones		
#1	List of systems identified	Q1 2014
#2	Landscape of systems delivered	Q2 2014
#3	Options Evaluation completed for approval	Q2 2014
#4	Policy Document	Q3 2014
Programme Governance Board		
ISLOG subset		

IS Strategy Theme – Customer Access and Services

Programme	Customer Access & Channel Strategy	IS Lead	Mike Fitzpatrick	Status	Pipeline
Background	<p>The advancement of new communication mediums (Web, mobile, social media) provides both an opportunity and a challenge. Some customers will actively embrace new technology trying and finding the solution that best fits with their lifestyle, while others will wish to continue to use the mediums they are used to and comfortable with.</p> <p>The opportunity for the organisation is to benefit from the new ways of working; improved customer engagement, improved service through faster response times, delivering operational efficiencies. The challenge is to develop a roadmap to transition to the new ways of communicating in a way that maintains and improves the customer engagement.</p> <p>This one pager proposes to build on the Contact Strategy work already completed, to provide the direction and intended benefits as a focus for the future planned work; to best serve our varied COL customers.</p>				
Project Objectives	<p>To document a Customer Access and Channel Strategy based on customer insight. To better understand our customers and how they access COL services and how departments manage their relationships with key clients and VIP's. This will provide direction on how the service provision should develop to enhance the customer, key client and VIP experience.</p> <p>6) Build on previous work to review, ratify and consolidate proposed benefits from the customer strategy, including:</p> <ol style="list-style-type: none"> a. Deliver a digital 1st approach, while maintaining choice for the customer. b. Provide opportunities for self-service and resolution at the 1st point of contact. c. Provide high quality services and customer care. d. Provide a single view of customer, key clients and VIP's interactions with different parts of the Corporation. e. Provide data integration and consolidation of business information, enabling clearer reporting and support to business decision making. <p>7) Expand and share Contact Centre and CRM usage across COL to deliver an enhanced service offering to our customers whilst making efficiencies and savings.</p> <p>8) Provide guidance to the rationalisation of customer applications as part of the overall strategy.</p> <p>The work proposed in the JDP CRM solution (separate one pager) will provide business analysis and technology roadmap to deliver this strategy.</p>				
Scope					

1. Customer Strategy - Develop a better understanding of how customer access COL services through the available channels.
2. Investigate what alternative channels could be used and what potential benefits they would deliver.
3. Review of current related customer Processes and Procedures.
4. Investigate the expansion of CRM and Contact Centre usage for Departments as appropriate. Review priority department's services and customer transactions.
5. Investigate utilisation of Business Intelligence for customer transactions to improve customer insight through the integration of data sources.

Costs	Approach to be agreed	
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Key Milestones		
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#1	Complete Service reviews & collate existing material	6 weeks
#2	Workshops & Customer Clinics complete and material compiled	8 weeks
#3	First draft paper ready for initial review	12 weeks
#4	Final Strategy paper ready for initial stakeholder review	16 weeks
#5	Strategy paper approval	16 weeks

Dependencies		
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- Output from the JDP CRM evaluation (separate one pager) will provide supporting information to the strategy.
- Business resources will be required to support the analysis workshops.

Decision This will deliver a matrix of information on service use, access channels and customer profiles		
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To initiate work on 'customer insights' through a cross departmental working group for the City of London. This will be used to shape customer access options and prioritise work on:

- Further CRM development.
- Further web development.
- Customer strategy.

Governance		
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Proposal is to replace the Web Decision Board with a Customer Access Strategy Board. This new Board will take ownership of the successful implementation of the Customer Access Strategy which will encompass all related themes, including CRM, Web development, and portal.

Note : This one pager is part of a programme of work on customer access

IS Strategy Theme – Customer Access and Services

Programme	Web Phase 4	IS Lead	Mike Fitzpatrick	Status	Pipeline
Background	<p>SOCITM is an organisation who undertakes a national assessment called “Better Connected” across all 433 UK local authority websites. In 2012 COL achieved a 3 out of 4 star score and the mobile accreditation, and set an objective to achieve 4 stars. Achieving a 4 star status aims to enhance the reputation of COL and receive recognition for the investment given to improving our web presence.</p> <p>The original web phase 2 project implemented 28 online transactions using a new online technology (AchieveForms). Web Decision Board now plan to expand this range of online services to provide greater access to services, better customer experience and encourage channel shift to online.</p> <p>Over the past 3 years during the web phase 1,2 & 3 phases there have been a number of enhancements raised by the business and editors that have been put on hold due to IS resource being focused on the delivery of the web project. Web Decision Board would like to action these enhancements to keep editors interested and actively engaged in enhancing the web design and content up-to-date.</p>				
Project Objectives	<p>9) Aiming to achieve 4 star SOCITM in 2014 score with mobile accreditation. 10) Increase customer channel shift to online transactions. 11) Consolidate technology stack and system support for COL web technologies. 12) Further enhance user and customer experience (introduce new features & templates to improve access). 13) Improve editor tools in content management system to improve workflow and features.</p>				
Scope					
<ul style="list-style-type: none"> • Further expand priority online transactions available to residents, businesses and visitors of the city (priorities to be finalised through workshops) • 80x PRO and Business enhancements to the existing COL website and SharePoint content management system 					
Costs	Development approach to be agreed.				
Key Milestones					
#1	Discovery & Scoping period – By end Feb 2014				
#2	Estimates for enhancements – To be defined by end of Q1 2014				
#3	Scoping and prioritisation of transactions– To be defined by end of Q1 2014				
#4	Estimates for transactions– To be defined by end of Q1 2014				
#5	Investigation into existing databases on old COL website – To be defined by end of Q1 2014				
#6	Web Phase 4 IS Gateway 2 – To be defined by end of Q1 2014				
#7	Web Phase 4 PID sign off – To be defined by end of Q1 2014				
#8	Monthly user requirements documentation – To be defined by end of Q1 2014				

#9	Monthly development / release life cycle
Dependencies	
<ul style="list-style-type: none"> • IaaS cloud (Decommissioning of KCOM). • Joint Development Partnership investigation for transactions. • SOCITM recommendations 2014 – to be released March 14. Needs to be assessed and may be change controlled add to scope. • Appointment of an Ecommerce and transactions lead. 	
Decision	
<p>To make ISSB aware of continued areas for development identified by the Web Decision Board:</p> <ul style="list-style-type: none"> • Aim – to ensure work is continued on priority Web development until the initiation of a wider customer access programme. 	
Governance	
<p>Web Decision Board Susan Attard Chairman, Sue Ireland, Tony Halmos, Warren Strother, David Pearson, Graham Bell, Melissa Richardson, Sorabh Arora, David Hunt, Jill Bailey, Helen Anderson</p> <p>Business Lead Melissa Richardson E-Commerce & Transactions Lead (To be appointed)</p> <p>Proposal is to replace the Web Decision Board with a Customer Access Strategy Board. This new Board will take ownership of the successful implementation of the Customer Access Strategy which will encompass all related themes, including CRM, Web development, and portal</p> <p>Note : This one pager is part of a programme of work on customer access</p>	

IS Strategy Theme – Customer Access and Services

Programme	Joint Development Partnership (JDP) CRM	IS Lead	Mike Fitzpatrick	Status	Pipeline
Background	<p>A Joint Development Partnership (JDP) between Havering, Newham and Waltham Forest Councils was established in 2010 to develop a common technological solution (including CRM, web, customer portal) to enable each borough's Customer Transformation Programmes. This solution has been successfully implemented.</p> <p>Early in 2013, COL signed an MOU with the JDP, where we provided our customer portal code in exchange for enhancements made by the JDP to this code. In addition this MOU gives the City access to MyPlace (online mapping) and the 'Core' elements of the JDP CRM solution.</p> <p>The JDP CRM implementation provides additional functionality over the current COL solution, including a single view of customer, business intelligence and reporting, integrations between CRM, website and back office systems.</p> <p>To deliver our customer transformation strategy and build on the success of "Access to Services", we will need to further develop our CRM and web solution to integrate with services.</p> <p>The proposed work will conduct a cost/benefit analysis of the JDP solution and assess the potential to reduce cost and timeframes over a COL in-house development.</p>				
Project Objectives	<p>14) In conjunction with the strategy development, analyse priority service lines to understand their requirements and determine the benefits and costs of delivering the required business objectives.</p> <p>15) Evaluate current COL CRM & Web systems and the JDP Solution to develop a technology roadmap to deliver these objectives.</p>				
Scope					
<p>8) Investigation into the current capacity of the CRM and web portal solution and infrastructure to determine if any additional investment in capacity is required.</p> <p>9) JDP core and existing COL process analysis to determine the effort required to introduce. JDP core and maintain the same business outcomes of the existing COL CRM & web solutions, plus introduce MyPlace mapping, LLPG and Multivue.</p> <p>10) Business workshops (gap analysis) with all scoped services, to determine requirements to assess these against the JDP solution, and to quantify benefits impact as part of overall Customer strategy and to support the business case. These services include Parking Permits, Waste, Streets & Highways, Highways charging, City surveyors, Web transaction, Knowledge base, Licencing, EDO, E-Invitations and the Police.</p>					
Costs	<p>Technology Roadmap : £tbc</p> <p>Review of Services : £tbc</p>				

	Internal BA resources will be used to run workshops with services. Business resources will also be needed to support the workshops. Anticipated duration 3 months.	
Key Milestones		
#1	Analysis of Core Infrastructure Complete	6 weeks*
#2	Analysis of Priority Services Complete	8 weeks*
#3	Report Provided by JDP	10 weeks*
#4	Business Case Produced and submitted to ISSB	14 weeks*
	*Start date needs to be confirmed	
Decision		
<ul style="list-style-type: none"> ▪ To initiate work and approve costs for a 'discovery' phase for CRM development. In order to prepare the base technology solution for further CRM and Web development: <ul style="list-style-type: none"> ○ Aim – to improve the customer experience and reduce potential costs of further CRM development across a range of services. ▪ In parallel with the discovery work above, continue with the priority departmental CRM developments: <ul style="list-style-type: none"> ○ Aim – to ensure work is continued on priority CRM development until the initiation of a wider customer access programme. 		
Governance		
<p>Proposal is to replace the Web Decision Board with a Customer Access Strategy Board. This new Board will take ownership of the successful implementation of the Customer Access Strategy which will encompass all related themes, including CRM, Web development, and portal.</p> <p>Note : This one pager is part of a programme of work on customer access</p>		