1. Background

1.1 On 1st December 2018, WCC successfully implemented the new Integrated Business Centre (IBC) solution which was a replacement for the BT Managed Services. This is delivered in partnership with Hampshire County Council (HCC). The deployment of the new system was completed on time and on budget with minimal issues reported at Go Live. Positive feedback from across the organisation was also received.

1.2 Hypercare, a period of intensive support in-house and by Hampshire, immediately followed the deployment. Hypercare was in place for the month of December 2018 following Go Live. This ensured that the service was functional and that issues were resolved quickly through daily board calls, peer to peer calls between programme functional leads, surgery sessions, regular communications and support from the 100+ IBC floorwalkers. There was also co-ordination to address access, functionality and structure changes quickly. Help and guidance in the form of PowerPoint slides and bite size videos was also made available for all staff and 3rd party organisations.

1.3 The hypercare surgery sessions were terminated earlier than planned (after 10th December) due to a lack of issues raised at the earlier sessions. Floorwalkers also fed back on daily calls that there were no longer issues being reported to them. This meant the project had run very successfully through the go-live with the extent of issues arising being considerably less than had been considered possible.

2. Stabilisation and Transition to Business as Usual

2.1 The stabilisation period was initially planned to run from 1st January 2019 to 31st March 2019 with the view of going to Business as Usual (BAU) stage on 1st April. However, the data of the transition to BAU was always planned to be flexible and
dependant on partners being satisfied that all new processes had embedded across the organisation. The partnership acknowledged that the onboarding had been a success, but also recognised that improvements in the performance metrics was required before the partnership could be deemed stable enough to move to BAU. It was agreed at the final stabilisation board in March 2019, by all parties, that an extended period of monitoring was required.

2.2 At the latest performance board meeting held on the 5th September 2019, it was agreed to consider the 9-month review on the IBC performance metrics at the October board meeting and decide whether BAU can commence. However, positive progress was also reported in the key areas.

2.3 The key areas of focus for the council team are as follows:

- Increase HR self-serve transactions to 80%.
- Decrease overall contact volumes proportionally comparable to existing partners. This will be measured by alignment to the planned forecast.
- Increase compliance to finance processes such as service order approvals, goods receipting and a maximum of 20% returned invoices.

2.4 WCC performance against each of the stabilisation criteria will be discussed in detail later on in the report.

2.5 During the first three months of stabilisation (January- March 2019), the following measures were undertaken to ensure the service was fully functional and to facilitate the embedding of IBC across the organisation.

- Weekly partnership board meetings
- Weekly Stabilisation and Performance Monitoring calls with all functional leads
- Weekly meetings between the Hampshire Partnership Manager and the WCC Business deployment lead to discuss ongoing communications required to the business
- All staff communications to the business for key messages – weekly throughout January, fortnightly during February and ad hoc in March
- Provision of budget manager and requisitioner focus training sessions
- Organisational structure sessions for line managers led by Westminster HR

2.6 Due to the success of these activities most of these measures were no longer needed from April 2019 to the present time. From April to present, weekly peer to peer calls are held between the WCC and HCC team to discuss outstanding issues from the stabilisation process and prioritise any change requests that require immediate implementation. Monthly performance group meetings between the senior leads of WCC and HCC now replace the weekly partnership board meetings to review performance data, progress on 3-month review recommendations, and high impact business issues from the stabilisation trackers.

3. Post Go Live Engagement

3.1 An IBC satisfaction survey was sent out in May to all staff and 3rd party organisations. A total of 342 users responded. According to the survey, users find IBC easy to use.
• 90% reported that they found ESS Lite easy to use
• 4 out of 5 respondents found the IBC Portal easy to use
• 4 out of 5 was the most popular score awarded to all methods of contact
• Over 50% of respondents said they had used the IBC SharePoint site
• 57% rated IBC advice and guidance as a 4 or 5 while 28% rated it as 3 out of 5. 11.% rated it as 2 and the remaining 4% rated it as 1 out of 5.

3.2 The IBC SharePoint site has serviced more than 65,000 site visits to date with almost three thousand unique viewers. The site hosts the IBC bite size videos, power point guides and IBC hints and tips which provide staff with help and guidance on how to access and use the IBC system.

3.3 In addition to regular comms and engagement activities, additional training sessions were held after Go Live to support staff and managers. These included:

• 16 Requisitioner sessions
• 10 Line Manager and Organisational Structure sessions
• 8 ESS Lite sessions

3.4 To further embed the IBC, current comms and engagement initiatives include:

• Regular Leadership Team Updates
• IBC headlines in the Westminster Way Newsletter sent out fortnightly
• Monthly IBC Newsletter
• Monthly Drop in sessions/morning tea at the Café for staff to take IBC enquiries to functional leads/experts
• Fortnightly hints and tips bulletin on Purchasing and other related items
• Regular Yammer posts
• Purchase to Pay/Requisitioners Surgeries
• Forecasting Training Offer to Directorates
• Recruitment Training for Managers

4. HR Self-Service

4.1 ESS Lite and the IBC Portal enable staff and managers to self-serve HR tasks, for example booking/approving annual leave, recording sickness and amending personal/employee details and had a high usability score in the survey.

4.2 The stabilisation target for HR Self-service transaction is 80% which was reached in April and May with 80.5% and 83.2% respectively of all HR transactions being Self Service.

4.3 June was below target but the council would have met the target had it not been for staff performance related pay which required manual IBC intervention. A number of staff from across the organisation were put forward for step ups. The changes in staff salary required manual encoding by the IBC which then had an impact on the June self-service figures. July figures are also below target due to election payments, retained pay and a technical problem with locked sickness records where managers cannot edit sickness records of their staff. All these required manual IBC intervention
to update files. An issue of locked sickness records which also generated additional contact has now been fixed by the IBC and all residual issues are reported as resolved.

4.4 See graph below showing HR and pay transactions completed via self-service against target from January to July 2019. At the September board meeting, HCC agreed that the HR self-service target had been met for 4 consecutive months from April 2019.

4.5 The pronounced dip in March was due to the onboarding of new colleagues from City West Homes in April which required manual input of HR data.

5. Contact Volumes

5.1 IBC can be contacted by phone, via webchat or by raising an enquiry form. The contact channel most used by staff and suppliers is through telephony. This was followed by enquiry forms and webchat. The contact channel mix figures from Dec 2018 to July 2019 are;

<table>
<thead>
<tr>
<th>Month</th>
<th>Call</th>
<th>Enquiry Form</th>
<th>Webchat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec-18</td>
<td>48%</td>
<td>49%</td>
<td>3%</td>
</tr>
<tr>
<td>Jan-19</td>
<td>43%</td>
<td>55%</td>
<td>2%</td>
</tr>
<tr>
<td>Feb-19</td>
<td>41%</td>
<td>66%</td>
<td>3%</td>
</tr>
<tr>
<td>Mar-19</td>
<td>41%</td>
<td>55%</td>
<td>4%</td>
</tr>
<tr>
<td>Apr-19</td>
<td>44%</td>
<td>51%</td>
<td>5%</td>
</tr>
<tr>
<td>May-19</td>
<td>49%</td>
<td>54%</td>
<td>7%</td>
</tr>
<tr>
<td>Jun-19</td>
<td>59%</td>
<td>36%</td>
<td>5%</td>
</tr>
<tr>
<td>Jul-19</td>
<td>60%</td>
<td>35%</td>
<td>5%</td>
</tr>
</tbody>
</table>

5.2 Supplier enquiries is one of the main reasons for the high number of telephone calls. In order to reduce the number of supplier related calls, the supplier pages on the WCC website have been updated with more guidance information about getting paid on time.
A further supplier comms will also be sent in September to include how to register with the supplier self-service system.

5.3 Staff are also encouraged to self-serve by using the guidance pages in the IBC landing page or in the SharePoint site prior to contacting the IBC. HCC and WCC are looking at ways to potentially channel shift some of the contacts to webchat.

5.4 Contact volumes generated for July have been consistently below those forecast and are comparable to the figures of the existing partners, meeting the stabilisation target. The forecast is based on modelling of demand by the IBC based on the time of year, specific events WCC contact volumes against forecast for the months of January to July 2019 were:

![WCC Total Contact vs Forecast](image)

6. **Returned Invoices**

6.1 A high number of invoices were returned in the first few months of stabilisation with the highest percentage of invoices returned being 36.6% in March. The top reason why invoices were returned was that they failed the first scan in the system. These failures occur when the scanner automatically rejects the invoice due to the lack of a PO number, invoice number, total value or other missing information.

6.2 Other reasons why invoices were returned include times when the invoices have not been actioned or were rejected by the department. WCC has now agreed with the IBC to no longer return invoices that have not been actioned by the departments.

6.3 The volume of returned invoices has steadily reduced, and we are now achieving the stabilisation target of less than 20% returned invoices with a 17.3% figure for July. See data below on returned invoices from January to July compared to target.
The following initiatives are in place to ensure that this trend continues, and the number of invoices returned remains low:

- Notifications are sent by the IBC via E-Mail to staff/managers who have outstanding actions to complete.
- Regular hints and tips on the Purchase to Pay process are sent to all requisitioners.
- Update on our supplier pages providing guidance about raising invoices.
- Further supplier comms to be sent out about supplier self-service and guidance.
- Targeted support is also offered to staff who have been identified as having the highest number of unpaid invoices as well as to suppliers with the highest number of returned invoices.

7. **IBC Response Rate and Resolution Rate**

7.1 100% of the cases are responded to by the IBC support team within 5 working days. Between 96-98% of the cases are resolved within 10 working days.

7.2 Since January, between 72% - 77% of the calls and enquiries were resolved at first point of contact. HCC and WCC are working jointly to improve on this. HCC will work with their customer support team on ownership of enquiries and WCC to encourage staff to ensure that all information is provided in the enquiry forms raised so issues can be resolved at the first point of contact. Further discussions are held at the peer to peer group to understand the issues better.

8. **Forecasting and Budget Monitoring**

8.1 As part of the IBC self-service model, forecast planners across the organisation were expected to input forecasts from June 2019 onwards in the IBC.
8.2 Training for Budget holders was held between January 2019 and March 2019. Further training for the Finance team took place in May 2019 so that they were ready to support their budget holders.

8.3 The forecasting period in WCC is open for 4 working days every month.

8.4 There are 336 forecast planners identified across WCC. There has been a steady increase of between 8%-10% of the number of forecast planners doing their forecasting using the IBC since June 2019.

<table>
<thead>
<tr>
<th>Month</th>
<th>No. of Forecast Planners Who Input Forecast in IBC</th>
<th>% to total number of forecast planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>61</td>
<td>18.15%</td>
</tr>
<tr>
<td>July</td>
<td>94</td>
<td>27.98%</td>
</tr>
<tr>
<td>August</td>
<td>122</td>
<td>36.31%</td>
</tr>
</tbody>
</table>

8.5 Continued support and surgery sessions are being offered to directorates to help build the capability of forecast planners to do the forecasting themselves correctly. Additional easy to understand guidance and online videos on forecast planning for managers are also currently being developed.

9. 3rd Party Access

9.1 All outstanding 3rd Party access issues from Go Live have been resolved. The Citrix Solution Upgrade which enabled users to download, view and print documents has been tested and rolled out to all 3rd party users with positive feedback.

10.  HR and Finance Reporting

10.1 A review of both HR and Finance reporting in the IBC has taken place. The review found that some of the reports in the IBC required improvement. This is being addressed as part of the ongoing work between WCC and HCC to improve reporting for both Finance and HR.

11. Joint workshops Post Go Live

11.1 The drive to fully embed IBC continues. WCC and HCC have held several joint workshops to continue to address issues and seek solutions for any remaining issues.

11.2 HCC and WCC held a joint workshop on the purchase to pay process and discuss issues and improvement steps in August.

11.3 Visits to HCC by HR leads to meet and greet the contact centre agents and to further understand how calls are being resolved took place in June. Positive feedback had been received from HR about the visit.

11.4 Finance and HR held workshops on reporting with HCC to address issues and identify improvement opportunities to make the reporting fit for purpose. Work on improving the reporting is ongoing and is continuously being discussed at the peer to peer calls and at board meetings.
11.5 Recruitment workshops delivered by HCC are ongoing to build capability of our managers in using the IBC for recruitment.

12. Next steps

12.1 The September performance board meeting was held on the 5th September 2019. This noted successful progress in all areas and it was agreed at the October meeting a full performance report will be produced. The most recent trend performance data suggests progress is continuing to be made and it is believed that full BAU will be commence after the October meeting based on the performance data and stabilisation criteria. At BAU, a new governance will be in place which will be based on strategic monitoring of the partnership. Meetings will likely include:

- Monthly Partnership Board meetings
- Monthly Performance Monitoring calls between functional leads

12.2 Comms and engagement initiatives will continue to ensure that the IBC is fully embedded across the organisation. Support and guidance will continue to be made available to staff.