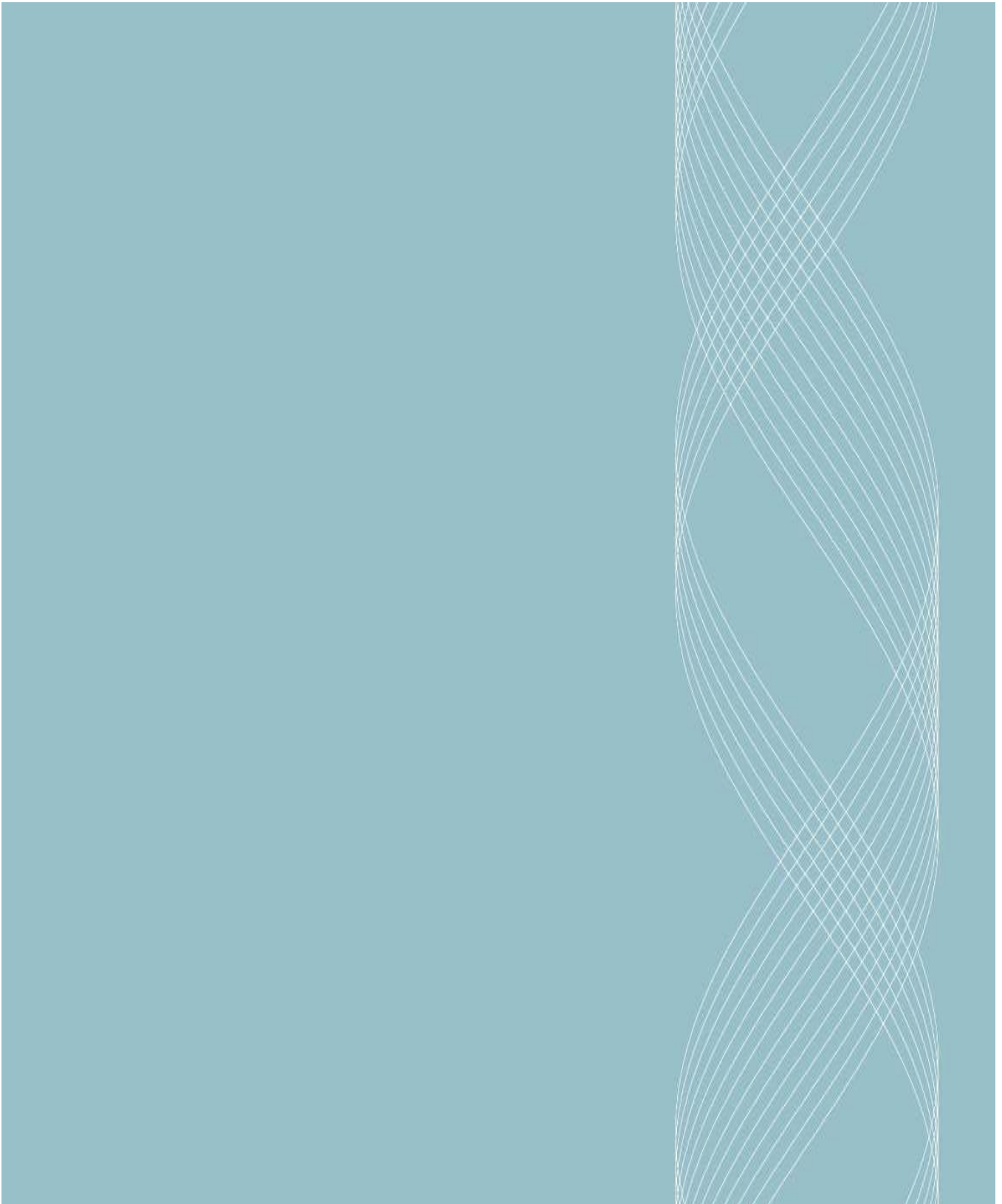




Service Design and Delivery Guide

Achieving high take-up of e-services, cost savings
and better quality public services



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Definitions

Customer

The terms 'customer' and 'end-user' are often used interchangeably within organisations. A distinction should be made between the two. A customer is the purchaser or user of goods or services but not necessarily the end user or consumer.

Customer Relationship Management

A management philosophy to identify, develop and utilise relationships between an organisation and its customers to achieve particular goals from both the business and customer perspectives. It is enabled by the use of technologies which capture detailed information about individual customers that support analysis from which appropriate interaction can be designed and managed to suit business and customer needs.

Unless explicitly stated, any reference to CRM will refer to the philosophy not the technology itself.

Business Processes

A business process is a 'structured set of activities designed to produce a product or service for a customer'¹.

Service

A service is the benefit that an organisation delivers to its customers. It may be delivered through a series of business processes which, in turn, comprise different transactions.

A service can range from simply publishing information to something as complicated as issuing a passport which involves numerous and different business processes and types of transaction.

Transaction

A transaction is the exchange of value between two parties. For services delivered digitally this can be represented by the sending and receiving of data, which results in or aids the delivery of a service. Transactions are sub-elements of business processes. Any definition of a service will identify the types of transactions that occur in order for it to be delivered.

Delivery Mechanism²

The business of government is carried out by a network of different types of organisation, for example government departments, non-departmental public bodies, non-governmental partners or intermediaries. The organisation or hub that is constructed to deliver a service is a delivery mechanism for government. These delivery mechanisms make use of channels to physically or electronically deliver those services.

Channel

A channel is defined in this guide as a means for organisations to deliver services to customers. There are eight principal channels; face-to-face telephone, post, mobile, web (PC), kiosks, digital television (DTV) and fax.

Service Delivery Strategy

A service delivery strategy represents a set of business driven choices about how services will be delivered to customers. Service delivery strategy is about making organisations more customer-

¹ Process Innovation – Thomas Davenport (1993) Harvard Business School Press.

² Landscape and End-to-End Reviews: Guidance for Departments, Office of Public Service Reform, December 2002

centric. In its simplest form, government has traditionally arranged its service delivery around its own organisational structure rather than the needs of the citizen. A strategy addressing end-to-end service delivery from the perspective of the customer as well as the provider itself, is a means of reversing this state of affairs.

Public Service Providers

Public Service Providers is used as shorthand for central government, local government, non-departmental public bodies and agencies.

Executive Summary

Reflecting recent developments in the public service reform agenda, public service providers have requested additional guidance in the areas of :

- Take-up of e-services
- Efficiency savings
- Design of high quality public services

The Service Design and Delivery Guide provides assistance to those facing the challenge of electronically enabling public services. The assistance is made up of principles, guidance, tools and checklists that can help them succeed. The main messages for building effective service delivery are listed below.

Section 1 - Principles

- **Principles** The six principles that should underpin service transformation in government are:
 1. Maintain and implement a service design and delivery strategy which improves the quality of public services, creates significant take-up by electronic channels and results in cost savings.
 2. Design and deliver all services on an e-enabled multi-channel basis, using research about customer needs, access and usability requirements, and exploiting self-service wherever possible.
 3. Utilise existing citizen or business e-enabled service providers before investing in or upgrading public services.
 4. Design and deliver services according to e-Government service standards.
 5. Set and manage a migration plan which progressively moves customers to cheaper channels and a lower cost per transaction, whilst maintaining or improving the quality of the service. Ensure there are specific milestones for switching off or winding down expensive channels.
 6. Set targets for, measure and manage customer usage of and satisfaction with the service.

Section 2 – Take-Up and Channel Migration

- **Customer Needs** Understanding the needs and preferences of customers is vital if new channels are to be successfully exploited by government. By carefully studying a service, its constituent elements, its customers and the channels by which it is delivered, public service providers can better create new e-services. They can do so not only in a way that satisfies the customer, but in a way that delivers efficiency savings.
- **Channels Analysis** It's important to analyse service delivery from both the customer-need and business-need perspectives and balance the value that use of particular channels can create. Simply automating an existing service process is unlikely to add value to either the customer or the provider. The clear demonstration of benefit to both the provider and customer is essential for the success of a service delivery strategy.
- **Change Programme** Channel migration is more than simply persuading customers to switch channels. It is also concerned with migrating the provider's organisation - its people, processes and technology to a new operating model. It requires a change programme. In order to achieve this change, it is essential for a provider to understand:
 - Where it is today
 - Where it wants to get to
 - What the gap is
 - What needs to be done to close that gap

Section 3 – Multi Channel Management

- **Consistent Experience** The key aim of multi-channel management is to present a consistent and coherent experience to the customer and to manage the customer as a single entity. The three key responsibilities in multi-channel management are:
 - Ensuring that the services being delivered to customers are seen to be effective
 - Driving take-up of self-service channels through marketing
 - Ensuring the organisation realises the desired cost-savings
- **Business Transformation** A prerequisite for benefits realisation is the accompanying need for business transformation. Managing the change in service delivery will impact the provider strategically as well as operationally. Each provider should consider:
 - Developing its people skills and job roles
 - Aligning and restructuring its business processes
 - Supporting business transformation by selecting appropriate technologies
- **Technology** The technology selection should underpin the reengineered processes. The technology strategy should favour solutions that support individual units within the provider performing different roles around the same customer service.

Section 4 – Channels Decision Framework

- **Channels Framework** Use of the Channels Decision Framework can assist public service providers to develop a public sector multi-channel service delivery model. The five key elements of the framework are:
 - Know your customers: segment to gain insight into motivation and usage.
 - Know your services: define services, business processes and transaction types.
 - Know key routes to market.
 - Analyse channels: for usage by customers, suitability for transaction type and for cost of implementation.
 - Map to decide channels: map knowledge of services, customers and transaction.

Introduction

Background

Following recent developments in the public service reform agenda, public service providers have requested additional guidance in the areas of service design and delivery.

Sir Peter Gershon's Efficiency Review report, *Releasing Resources to the Front Line*, recommended that in order to strengthen the effectiveness of investment in transactional services, the Treasury and the Cabinet Office e-Government Unit should issue a benchmark standard for high quality strategies to ensure that new electronic services and channels get high levels of take-up. The benchmark standard is summarised in the checklist in Appendix 1, and supplemented by the guidance in this paper³.

Purpose

The purpose of this guide is to assist public service providers to develop their own service delivery strategy so as to fulfil their commitment to achieving high levels of take up of e-enabled services, and the specific cost savings suggested by the Efficiency Review.

This guide can be used to:

- Enable providers to develop coherent service delivery strategies that encourage high take-up of electronic services, achieve cost savings and deliver better quality public services.
- Improve understanding of the impact a multi-channel service delivery strategy has on public service providers.
- Deliver a clear message about the relationship between existing PSA targets around electronic service delivery and recommendations of the Efficiency Review.

Target Audience

This guide is aimed primarily at those people responsible for, or with an interest in, service design and delivery in central government, local government, non-departmental public bodies and agencies. It is also intended for those with marketing and communications functions within public service providers who are responsible for considering the incorporation of electronic channels alongside other traditional channels. The paper also aims to inform a wider audience of intermediaries, industry stakeholders, the voluntary sector and citizens of government's approach to multi-channel service delivery.

³ This paper updates the *Channels Framework; Delivering Government Services In The New Economy* and subsumes the Take-up Core Considerations document.

Section 1: Principles

'Public service provider' is used as shorthand for central government, local government, non-departmental public bodies and agencies

1.1 The Strategic Intent

The efficient delivery of high quality public services

1.2 Principles

Principle 1: Maintain and implement a service design and delivery strategy which improves the quality of public services, creates significant take-up by electronic channels and results in cost savings.

The principle builds on the previous channels framework, but has been updated to reflect the recent policy drivers. The principle is predicated on the idea that a high quality service will meet customer need and be efficient to run.

The levels at which a service delivery strategy needs to be maintained will depend on the composition of services offered by, and organisational structure of a public service provider. Those offering a disparate set of services, delivered by a multiplicity of business units might initially require a strategy for each business unit – and a broader 'vision' strategy for the provider as a whole.

The 'vision' or highest level service delivery strategy should be owned at the uppermost level of the public service provider by a senior champion.

Principle 2: Design and deliver all services on an e-enabled multi-channel basis, using research about customer needs, access and usability requirements, and exploiting self-service wherever possible.

While customer needs should always be at the core of the service design process, so too must the needs of the provider. Service design will be a balancing act between the value created for the customer and also that for the provider. Value to the customer will be reflected as a 'better' service, value to the provider by cost savings and/or the realisation of the policy goal underpinning the service.

The principle embraces several fundamental ideas of service design. Customer requirements must be at the heart of the design process - usability and accessibility through multiple devices should be central to the design of services. Customer needs may also cross boundaries between providers: existing silo-based delivery should be challenged with an emphasis on joining up services around the requirements of the user rather than the organisational structure of the provider. Partnership working across organisational boundaries will be encouraged.

New services should be designed for delivery in a multi-channel e-enabled environment from the outset.

Public service providers should look to exploit the potential of electronic channels to allow those customers who are able, to benefit from a 'self-service' delivery model.

All services are cited because even physical services have an information or transaction element which can be e-enabled.

Principle 3: Utilise existing citizen or business e-enabled service providers before investing in or upgrading public e-services.

This principle is designed to ensure that existing cross-government initiatives are exploited fully before further investment is made. Specifically public service providers are expected to:

- Investigate the use of private, voluntary or public sector intermediaries
- Deliver services through Directgov, or if appropriate through Businesslink.gov
- Build and design all citizen-facing services so that they can be easily incorporated into Directgov at a later date, if immediate delivery via Directgov is not possible
- Specifically consult Businesslink.gov in designing services focused on Small/Medium Enterprises (SMEs)

Principle 4: Design and deliver services according to e-Government service standards

This will include:

- Government customer segmentation guidance
- Government service design standards
 - Usability, search and navigation guidelines
 - Business models for authentication and identity management
 - Cross-selling and cross-referencing guidelines
 - Metadata standards, e-GIF
- Government branding guidelines
- Government service operations standards e.g. routing between self-service channels and call centre case handling

Some of these standards exist already and will be incorporated into a more comprehensive service design and delivery standards framework at a later stage

Principle 5: Set and manage a migration plan which progressively moves customers to cheaper channels and a lower cost per transaction, whilst maintaining or improving the quality of the service. Ensure there are specific milestones for switching off or winding down expensive channels.

The mechanics of migrating customers from one channel to another will vary from service to service and provider to provider. This principle means that cost per transaction will need to be measured, according to a structured measurement framework. In certain providers it may be difficult to measure activity-based costs however, a way of benchmarking must be found in order to produce meaningful performance and cost data. The overall quality of the service should not suffer because of a drive to lower the cost per transaction

Principle 6: Set targets for, measure and manage customer usage of and satisfaction with the service.

Customer satisfaction needs to be measured for performance improvement reasons. Customer usage patterns (which will encompass take-up) are needed to ensure that service refinements are evidence-based.

2. Take-Up and Channel Migration

This chapter explores some of the key issues around achieving increased take-up, and migrating customers from existing to new channels to create value for the customer and the provider. It will cover the incentives and inhibitors to migrating customers between multiple channels, and the techniques to encourage that migration.

2.1 Customer take-up of e-services

“No-one is ever going to move to a channel or service that is harder to use or less beneficial”

Colum Joyce, Global Electronic Business Strategy Manager, DHL

New channels produce greater choice for customers. Understanding the needs and preferences of customers is vital if these channels are to be successfully exploited by public service providers. Demanding customers seek government services that are accessible and easy to use, and government is committed to meeting this expectation efficiently. Today's customers increasingly use traditional and electronic channels when accessing services. The choice of channels available to customer groups varies depending on three factors:

- Capability of the channel to support particular services
- The accessibility of a channel to its target customer segment
- The propensity of a target customer segment to use it

Customer preferences vary considerably by age, socio-demographic group, and location. Universal preferences cannot be assumed and therefore, to ensure accessibility, and inclination to use a channel, providers should find out the preferences of their customers in relation to the services and the types of transactions required. Customers place importance on the convenience of accessing government services via a mix of channels. For example:

- Visiting one stop shops
- Using an intermediary such as a post office
- By telephone
- Browsing Web sites

Private sector experience of multi-channel access has shown that traditional channels still play a significant role in facilitating the uptake of new electronic channels. Many new channels therefore are seen not as replacement channels but complementary. The private sector experience also shows that customers use different channels to consume different services but are equally likely to migrate between channels depending on their circumstances at the time. This implies two key working assumptions:

- Transactional processes should be consistent across the different channels so they appear seamless to the user.
- New channels when adopted by providers as an attempt to drive costs out and lower the cost per transaction, do not always result in the more traditional channels becoming redundant.

However this will vary from service to service. In some cases providers will want to end the use of a certain channel as quickly as possible. For example, utility companies have been working hard to discourage the use of payment by cheques. They do this by offering financial incentives that encourage payment by other channels and methods. Discounts are offered if the customer sets up a direct debit, pays by credit or debit card with a call to a contact centre or adopts the self-service approach by paying over the Internet.

2.1.1 How to encourage take-up

The following examples are some of the methods available to providers to increase take-up.

Marketing Simply making services available through new channels does not necessarily mean that customers will use them. Behaviour can be influenced by making people aware of the value added to their service experience when using new channels and thus making take-up more likely. The key to influencing behaviour positively is to market the advantages of changing – or indeed the disadvantages of not changing - to the customer. Positive drivers need to be identified and used since inertia is often the most powerful shackle preventing behavioural change.

Incentives Offering customers incentives to use an online service is a useful approach to drive take-up, and public sector providers should consider the full range of resources available to them. The National Audit Office⁴ report on incentives in e-Government outlined four principal ways in which government could drive the use of new channels:

- **Money:** Direct financial incentives or payment flexibility are powerful ways to encourage customers to use a new channel. Some services owners, particularly those delivering services to which the customers are price sensitive, have succeeded in migrating customers to new channels by offering a lower price to those who serve themselves. This approach has been very popular in the utility sector. These incentives need to be accompanied by a comparable service level between old and new channels, to ensure the change in behaviour is permanent.
- **Legitimate authority:** Compelling customers to use a channel is another option to consider. Some companies have benefited from e-commerce by offering customers no alternative but to use the Internet if they want to access a new service. Behind the scenes, the organisation has benefited from this approach by combining self-service and a highly tuned delivery process that allows the low prices to be offered while maintaining good profit margins. There are, of course, some significant differences between the private sector and the public sector when considering the compulsion approach. Public service providers should be aware that the implications of channel closure, or even limiting access to certain channels, can vary considerably depending on the nature of the target customer segment. Political considerations will play a significant role in the decision making process. For many services the use of compulsion and/or offering price differentials to use specific channels may be difficult to justify where it will give rise to claims of inequality for those without access or ability to pay for those channels.
- **Time:** Saving a customer time can be used as a direct incentive. For example, personal tax returns need to be sent by post to the Inland Revenue by September to calculate individual tax liability. However, customers can gain a three month extension on this deadline by filing their return electronically via the Internet. This customer benefit has been actively marketed by the Inland Revenue, resulting in increased take-up of the online return service. Time can also be saved for the customer by allowing trusted intermediaries to bundle services with other related services or products, or by simply making them available to the likely customer segment via other existing relationships. This results in time being saved for the customer by allowing them to use sites and interfaces they already visit, and are consequently familiar with.
- **Information and expertise:** Customers can also be encouraged to use a new channel by providing them with enhanced information and expert advice through web site content and intelligent applications.

2.1.2 What discourages take-up

As well as the factors that encourage customers to use a service, it is important to understand the elements that inhibit customer use. Figure 1, below, describes some of the key inhibitors for customers migrating to self-service channels, and some suggested measures to minimise their impact.

⁴ Incentivization of e-government to accompany NAO Report, *Transforming the performance of HM Customs and Excise through electronic service delivery*, Helen Margetts and Hala Yared, 2003

Inhibitor	Counter-measure
Lack of confidence in security (of personal information)	Get it right. Commission an independent security review to try and break it.
Lack of accessibility	Plan the right services for the right customer segment
Non availability of service	Model your volumes optimistically to ensure adequate scalability*
Poor usability	Pilot service with subset of target customer segment
Lack of (channel) skills	Plan the right services for the right customer segment
Lack of, or poor, support	Provide an effective and complementary support channel

Figure 1: Inhibitors of channel migration and counter-measures

These inhibitors all need to be addressed in order to encourage customers to use a new channel. Wherever possible, piloting new service/channel combinations with a subset of willing customers is a worthwhile investment to test the new approach.

2.2 Channel Migration

When a provider decides to 'migrate' its customers across channels, it is embarking on a major business transformation, impacting all areas of its operation. The results will be very visible to both its stakeholders and its customers. In order to plan an effective channel migration programme, it is essential for the provider to:

- Understand where the provider is today
- Where it wants to get to
- What the gap is
- What needs to be done to close that gap

2.2.1 Baseline the Information

In order to plan the channel migration, baseline information will be needed to identify where the provider is, and where it wants to be. Much of this information will be available from the channel selection phase of implementing this multi-channel service delivery strategy. (See also Section 4.) However, it may be necessary to improve the level of detail and quality of the information to improve the quality of the programme plan. The information required includes:

- How are services currently delivered; by which channels and to which customer segments?
- How *will* services be delivered; by which channels and to which customer segments?
- Customer preferences and behaviour (drivers)
- Operational model and associated activity based costs

2.2.2 Plan the Changes

Once the baseline information has been established, the objectives of the programme can then be defined as incrementally closing the gap between the current state of affairs and the target service vision of high take-up, reduced costs, and better quality services. To plan the changes required to deliver these outcomes, it will be necessary to analyse other details, such as:

- The 'current organisation', including staff numbers and breakdown of skills
- The 'current infrastructure', in terms of buildings, communication networks
- The scope of services and the circle of influence
- Deconstruction of processes that underpin and support the provider's core services
- The information systems that support those processes, and specifically that support the customer channels involved

2.2.3 Who needs to be involved?

The overall migration may affect the majority of staff, and the strategy is likely to fail without their understanding and commitment. As with all such change programmes, early and effective communication is required to achieve staff buy-in to the reasons for the change and its objectives. In terms of who should be involved, the following structure is suggested:

- Governance needs to be at the executive board level of the provider.
- An empowered team should be established to drive the change process through

- the provider.
- Establishment of an agreed cooperative management team
- Single high powered sponsor
- High level issue resolution committee
- Empowered mid-level steering committee to manage day to day issues and resolve them
- Use of external experts to assist in identification of best-of-breed or likely success scenarios

Once the people structure is in place, they should operate to the following set of criteria:

- Clear set of goals and objectives agreed and adhered to by all participants
- Identification of common internal drivers
- Intolerance of unilateralism and personal or political agenda-pushing
- Clear and strong project management
- Information flows designed to illuminate not obscure
- Timelines designed to deliver in managed phases not big bang
- Clear business plan against which all deliverables are measured and monitored for success
- Clear accountability

2.3 Channel Migration and Value

2.3.1 What is Value?

Value is deemed to be provided where additional benefits are gained from consumption or provision of services and/or cost savings are generated without a corresponding drop in quality or level of service.

Service design will be a balancing act between the value created for the customer and also that for the provider. Value to the customer will be reflected as a 'better' service, value to the provider by cost savings and/or the realisation of the policy goal underpinning the service.

2.3.2 Identifying Value

Providers need to *identify* and exploit the 'value' of migrating customers to new electronic channels. Invariably this 'value' will be represented in terms of reduction in operating costs, increased customer satisfaction and the successful delivery of a policy objective.

The provider needs to plan how it will release cost, and a clear strategy is required. This strategy should address questions such as "are staff going to be redeployed or removed from the provider?" "Which new skills will be required?" "What infrastructure could be released?" "Which contracts will need to be wound-up or renegotiated?" Providing the answers to these questions will help to ensure maximum value is achieved via the migration of customers to new channels.

2.3.4 Business Case

The business case for deploying services through new channels should identify the value to the provider, including benefits for staff, along with the value to customers. Customers must use the channel in significant numbers if organisational benefits are to be achieved.

In the context of electronic channels, greater value creation is more likely to be achieved by the offer of information and transactional services that stem from a totally re-engineered service delivery proposition. Simply automating an existing service process is unlikely to add value to either the customer or the provider. The clear demonstration of benefit to both the provider and customer is essential to the success of a service delivery strategy

The business case for channel migration can be made by comparing the investment required by the programme to the savings in operational costs to be achieved. This is usually done through a combination of cost avoidance, cost reduction and revenue increase. However, other benefits such as service levels and customer satisfaction should also be taken into account for a better picture of value. A method of scoring these softer benefits is also needed. The public sector has experience of successfully using a balanced scorecard methodology, with its emphasis on

achieving outcomes and continuous improvement, for benefits measurement. For example, the e-Government business case guidance available from the Office of Government Commerce's Successful Delivery web site.

3. Multi-Channel Management

This section analyses how to manage a multi-channel environment, and offers some insights into how service delivery in a multi-channel environment might be improved.

3.1 Multi-Channel Management – what is it?

Multi-channel management is about trying to achieve and maintain a single view of the customer for the provider - and a single view of the provider for the customer, in order to maximise the level of service. It is also about trying to create an organisation that uses its investment in people, process, technology and infrastructure efficiently. The key objectives in this area are:

- Maximise take-up of self-service channels
- Realising cost savings
- Improving the quality of services

Management of the multi-channel environment should aim for continuous improvement against these objectives. It also requires an appreciation of their interdependencies, for instance, the trade-offs that must be made with respect to cost and service delivery quality. These are determined, in turn, by the nature of the cause-and-effect relationship that exists between drivers and a set of variables, such as marketing to boost take-up or increasing capacity to improve customer service.

In order to realise long-term benefits, multi-channel management should be a responsibility of the whole organisation, and the efforts of the executive board should be specifically focused on dealing with the three key objectives.

3.1.1 Delivering Effective Services to Customers

It is imperative to constantly monitor customer perceptions of the services they receive. Although they change over time, and change more rapidly for emerging channels, the public perception of value for money will ultimately be judged on the effectiveness of service delivery.

- Did they get what they wanted?
- Was it delivered in good time?
- Was it easy to use?
- Was it convenient?
- Was it safe?
- When it did go wrong was there a suitable fix/redress?

Customer Expectation: Meeting a customer's expectation is important, as is managing those expectations. If customers are made aware of a new self-service channel, but their initial experience does not live up to expectations, they are likely to revert to their previous channel and may not return quickly.

Performance is Critical: If the basic technical and business architecture to support the service is scaleable, then much will revolve around capacity planning. Hardware and software costs may pale into insignificance when compared with the damage to a provider's image and the financial cost of resolving the problem, if not enough capacity is built into plans. Recall the negative commentary that followed the launch of a supermarket loyalty card that encouraged online registration but did not provide sufficient server capacity to cope with the spike in demand that followed its launch.

Trends: Usage should be monitored and recognition of forthcoming marketing campaigns taken into account as they may cause sudden spikes in demand. Targets for self-service take-up volumes should be viewed with caution for the purposes of capacity planning.

Service Planning is an end-to-end activity. Scalability, for instance, is not just about technical architecture, it is about being able to meet and react to changes in demand. There are few self-service channels without associated support services – these support services tend to be well

trained customer advisors. It is far easier to add new servers or upgrade software licences than to recruit and train effective customer advisors at short notice.

Moreover, there is little point in having a slick front-end that allows a transaction to be commenced with the minimum of fuss, if there are subsequent delays caused by lack of fulfilment capacity needed to conclude the transaction. It is necessary to look at a complete picture of the service to the customer, and plan accordingly.

3.2 Realising Cost Savings

The governing objectives of channel management are to increase and maintain take up of low-cost electronic channels, drive costs out of organisations and increase public service quality. Public service providers will be investing to introduce new channels and market them. Return on the investment will be demonstrated by lower ongoing operational costs, a lower cost per transaction and the consequently more efficient 'journey' from policy through service delivery to outcome.

With this in mind, organisational capability and capacity should be designed for maximum flexibility and efficiency. The same service capability should be deployed regardless of which channel is used to access the service. Flexibility to deploy resources, typically people and infrastructure, to where they are needed by a continuously changing channel mix is also essential. As the capacity of new self-service electronic channels grows, the capacity of the channels they replaced should be lessened proportionately. Ultimately, costs can only be saved by removing resources from the cost base. There are two key types of such resources:

- **People:** Plan and communicate restructuring initiatives in advance. Explore all the alternatives and gain the cooperation of stakeholders. Remembering all the while that it is important to retain the right skills for the future shape of the operation.
- **Property and infrastructure:** Forward planning is essential as buildings and major equipment typically have long-term leases or service contracts associated with them, so releasing cost quickly can be difficult. The impact of other initiatives, such as flexible working, should also be taken into account when looking at the required property portfolio.

In some cases the benefits to be realised will be more complex than simple cost reduction. Many public service providers have revenue streams that make a significant contribution to their financial status. In these cases, whilst new channels offer the chance of attracting new customers and therefore revenue, it is vital to keep one eye on protecting existing revenue streams to realise long-term benefit.

3.4 Business Transformation

As well as addressing the key drivers, a prerequisite for benefits realisation is the accompanying need for business transformation. Managing the change in service delivery will impact the provider strategically as well as operationally. Each provider should consider:

- Developing its people skills and job roles
- Aligning and restructuring its business processes and
- Supporting it by selecting appropriate technologies

3.4.1 People Skills

The key to achieving all this is suitably skilled people. Public service providers must employ people who have the skills to drive a business process change programme and people who understand the role of strategic marketing. Any skills gap within a provider in these areas should be addressed before trying to embark on a significant service delivery programme. In order to identify the skills gap, the two key organisational areas involved in service delivery should be examined:

- Front office - manages the channels
- Back office - manages the capabilities that underpin individual public services and support the organisation as a whole.

Back office functions are aligned to processing individual public transactions in a channel-independent way, whilst the front-office manages the relationship the provider has with its customers across all channels in a service-independent way. The two responsibilities require different skills and different service cultures, and they need to be measured differently. The success of the front office will be measured on:

- Understanding its customer base
- Optimising the customer experience and
- Migrating the customers between channels

Some of the specialist roles required in the front-office will be:

- Customer Service agents
- Customer Service managers
- Customer analysts
- Marketing professionals

The back office will be responsible for processes associated with services, such as decision making, document management and mailing of paperwork. Success here will largely be measured on:

- Service levels
- Efficiency

The staff will be experts in their own service domain, and largely responsible for traditional fulfilment activities. Customers often need to speak to experts who are working on their case, so many back-office staff also need customer-facing skills.

3.4.2 Business Processes

The business processes that support individual public services, and those that support the provider as a whole, will need to be analysed, deconstructed and reengineered. In particular, processes need to be deconstructed into: customer transactions, front-office steps and back-office steps. Figure 2, below, gives an example of how the UK Passport Agency visualised such an analysis.

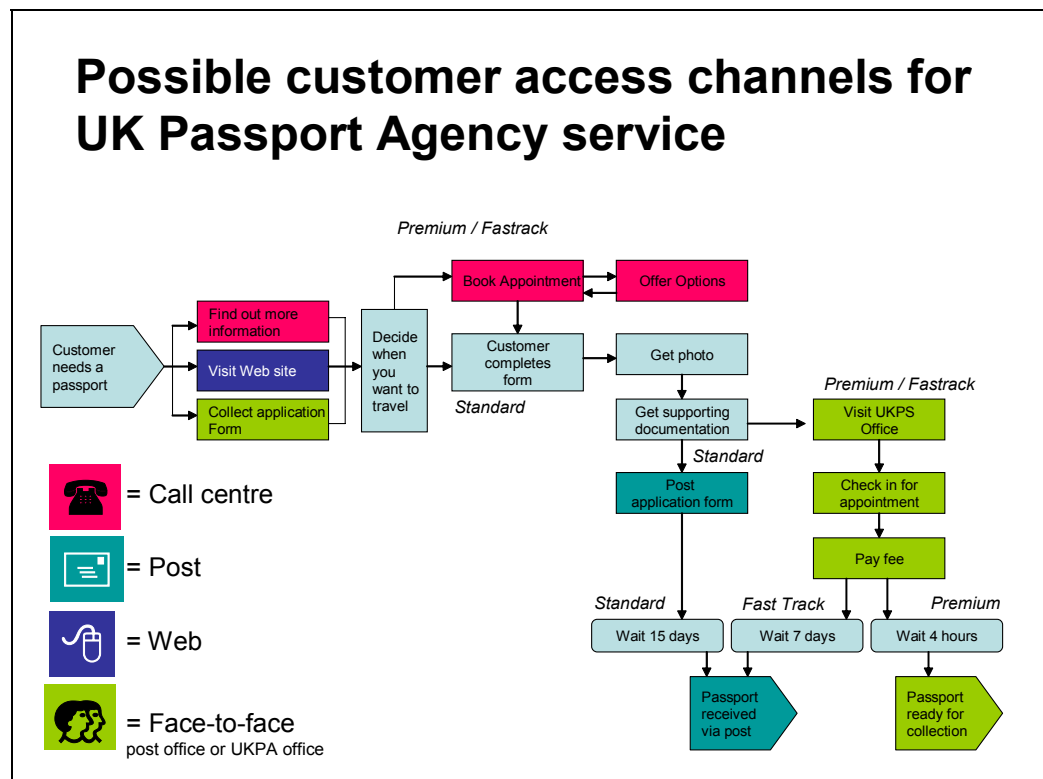


Figure 2: Customer access channels model
Source: UKPA

Breaking down a service into its constituent processes will enable opportunities for reuse of process steps across services in the future, with resulting cost savings.

Customers may choose to transact with the provider using different channels through the lifetime of a single service. Process steps therefore need to be largely channel independent, in order to provide the customers with a consistent view of the provider however they choose to transact.

A provider should segment its customers, map them to appropriate business processes *and* their propensity to use a given channel. Better views of customer touch points within business processes will enable providers to improve processes and services across the board. The emphasis here is on continuous improvement.

3.4.3 Technology

Information Technology (IT) will underpin re-engineered processes. The following should be taken into account by public service providers to support the delivery of services:

Multi-Channel Architecture: A multi-channel service delivery architecture is the ‘blueprint’ by which IT strategists plan to support the business requirements of a provider. This does not have to be overly elaborate and an example is given in the figure below.

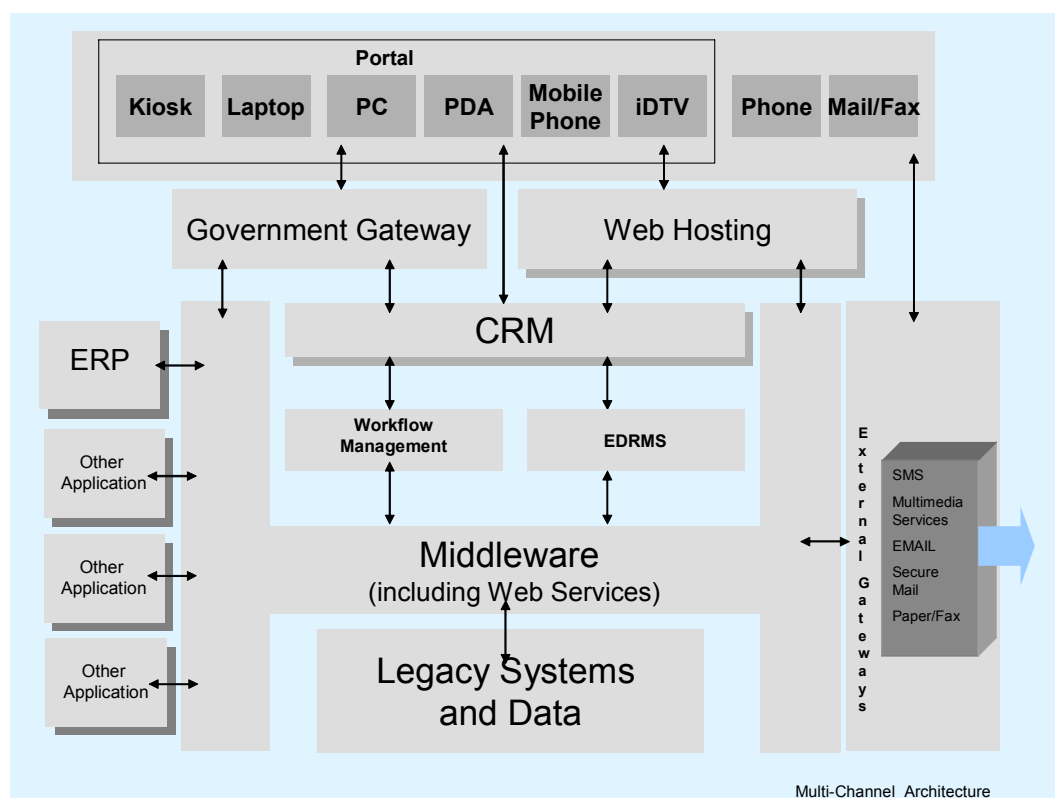


Figure 3: Multi-channel service delivery architecture

Technology Solutions: The eGU will develop guidelines and principles to support public service providers in creating a technical architecture to support service delivery.

This will allow public sector organisations to develop multi-channel solutions to meet their own needs whilst at the same time delivering a coherent government-wide channel architecture. The main benefit will be the re-use of architectural design patterns, infrastructure and software.

One of the key areas in which guidelines are being developed is the use of commercial off-the-shelf (COTS) solutions.

If purchasing commercial off-the-shelf (COTS) solutions, the products should support activities such as:

- Customer relationship management
- Workflow
- Case management
- Electronic documents and records management

Systems built in this way are easier to interface with other systems. They are also easier to replace or upgrade as the service delivery requirements change.

The majority of COTS solutions supplied by the major vendors are now produced with multi-channel models in mind. Only where there is a compelling business case should bespoke development be undertaken. If this approach is followed, the provider should ensure that technology lock-in does not ensue.

Customer Recognition: The front office should incorporate technology to manage both day-to-day contacts as well as maintain long-term relationships with customers. The key is the ability to recognise whether a contact is an existing customer or someone who is not known to the provider. Failure to achieve this transparency will result in the continuation of individuals having multiple existences within a single provider. This can result in the provision of a poorer service to the customer and a waste of resources at the provider.

Channel Blending: A solution is also required for real-time channel blending. This is when a customer transacts with the public service provider via multiple channels at the same time. For example, the customer is on the web and needs help so they telephone a 'Help' function within a call centre. To provide effective service, it is essential for the customer service agent talking to the customer to know what the customer is doing on the web, and preferably can help them directly.

Conclusion: Developing a strategy that embraces the elements outlined above will provide the flexibility for providers to:

- Deploy new services and make changes to existing ones
- Add new channels as they get adopted by the population.

Further details on the Technology aspects can be obtained from the Technology Policy team in eGU who are producing a solution guide to help providers implement effective technology solutions to support service delivery.

4. A Channel Decision Framework

As an aid to taking early practical steps, the e-GU has prepared a five step framework for making decisions about service delivery through multiple channels. The steps are numbered for ease of reference. While this implies they can be carried out sequentially, they can also be commenced simultaneously. The steps are:

- Know your customers: segment to gain insight into motivation and usage
- Know your services: define services, business processes and transaction types
- Know key delivery mechanisms
- Analyse channels: for usage by customers, suitability for transaction type and cost of implementation
- Map to decide channels: map knowledge of services, customers and transactions

1. Know your customers: segment to gain insight into motivation and usage

Knowledge about customers is one of the foundation elements of service delivery. There are many ways of gathering that knowledge but all should provide insight into why customers use the service – through need, by compulsion, through incentives, as well as their level of usage of the service. This knowledge will also feed into any subsequent service definition tasks and into the later channel analysis steps and allow for proper measurement of customer satisfaction and quality of service.

A popular method for gaining customer insight is to segment a service's customer base into groups that share distinct characteristics. These segments can be defined by different criteria. These include:

- Need or benefit sought
- Geography - e.g. postcode, region, city
- Demographics - e.g. age, sex, income, occupation
- Psychographics - e.g. lifestyle, personality
- Behaviours - e.g. usage, loyalty
- Access methods- e.g. Internet channel, face-to-face, mail, telephone

Each provider will use different criteria to segment their customers. Each segment will have unique needs and preferences for service delivery. Providers should restrict themselves to identifying and focusing on primary segments initially, otherwise the cost of identifying, analysing and managing many micro-segments may be excessive for the value it delivers.

Providers may have customers in common. In such situations cooperation may improve service delivery and the quality experienced by the customer. This can be achieved by bundling services together - either by theme (see the DVO case note below) or by customer segment.

Checklist

- Have you segmented your existing and target customers?
- Do you know who your current customers are and have you segmented them into groups in order to be able to identify their characteristics and needs?
- Do you know if those customer segments are already online? If so, what type of services do they use online? Which are the primary sites that they visit regularly? If not, what channels do they currently use, what is their propensity to go online and what are their concerns about doing so?
- Do you know which customers you want online?
- Have you analysed the current experience and needs of those segments?

- How do your customers currently use your service and what is their experience of it?
- Do you have management information systems that you can analyse to identify customers' key complaints about your service (e.g. confusion, bottlenecks, inconsistency of information etc.) and to measure usage. Your call centre/local offices/front line may have records of frequently asked questions. Your customers may have links to other organisations, e.g. charities that would be able to tell you where customers need help in a service. This information will be useful for baseline measurement of service provision.
- Have you undertaken environment scanning to identify relevant existing and planned projects (both government and non-government led) and to identify relevant stakeholders and their needs (including those of associated work strands such as business case development and benefits management strategy)?

Case Note 1

The Driver Vehicle Operator group comprises a number of government agencies concerned with drivers, vehicles and roads. Recently brought together into one organisation it has defined its customer base as the starting point to understanding customer needs, the customer's motoring life 'journey', associated 'pain points' and what mix of channels is most effective in serving different customer groups. This enables it to design more effective services. The DVO segmentation recognises that not all customers are the same. Three levels are defined:

- By type of customer with a common need, e.g. car drivers, motor bikers, truck operators etc.
- By sub-segment, e.g. a single truck owner-driver has different needs to a national haulage company with 100 vehicles
- By attitude, e.g. attitude to the Internet

This enables DVO to understand how it can serve these different segments in a more effective manner.

Case Note 2

Inland Revenue use website usage figures, feedback questions on online forms, structured and analysed customer feedback to their online helpdesk and phone surveys to targeted customers, e.g. those who started the filing process but never completed it. In addition, it is now running short life focus groups and a large, permanent customer panel in conjunction with their Customer Insight and Analysis & Research teams respectively.

2. Know your services: define services, business processes and transaction types

Knowing what services a government organisation provides and how it operates is vital if a successful implementation of a service delivery strategy is to be made.

Mapping of services at a high level is a basic but necessary early step. This process may result in the identification of common elements, be they channels, customers, processes or transactions.

It is also important to identify baseline metrics relating to existing channels, in particular staffing levels, performance, quality and costs. While many government organisations understand the total of cost of delivering a given service, it is often difficult to access activity based costs because most public service providers have not developed activity based cost systems.

Measuring performance meaningfully can also be nigh on impossible for similar reasons. Performance and cost measurement are linked and it is important to consider them together and develop a means to baseline current activity in order to have something against which progress may be measured.

Services should be then analysed and broken-down into their constituent *business processes*.

Then, analyse the *transactions* within the business processes against the channels available for delivery – see below.

An additional benefit of this approach is that it provides an organisation with the ability to put a monetary value on the outcome the service is intended to effect. For example, it might be possible to assess how much it costs government to get an unemployed person working again – taking

into account the contribution of all the diverse parts of the organisation; marketing, cost of Jobseekers Allowance, front office staff, overheads etc.⁵

In some cases there will be an inevitable tension between policy imperative and marketing logic. For example policy dictates that the long term unemployed should be targeted first while marketing logic might lead to targeting those customers who it is easy to get back to work.

In summary:

- Map services
- Identify baseline measures; staffing levels, performance, quality, costs
- Identify business processes
- Break down to transaction types

3. Know Delivery Mechanisms

Any initial exploration of service delivery should first explore and assess the utility of the provider's key delivery mechanisms. As part of drawing up a service delivery strategy a provider should investigate delivering its services via the following key delivery mechanisms:

- An intermediary
- Directgov, Businesslink.gov or the appropriate devolved administration portals

The e-Government Intermediaries Policy facilitates the delivery of e-Government services through private and voluntary organisations that have their own existing relationship with customers. These relationships are often stronger than those the public sector has with those customers. The policy allows citizens to use government services in familiar, tested contexts and enables intermediaries to strengthen their existing relationships with the customer. It has the potential to deliver improved take-up and offers a more efficient use of resources. Further information about the policy and its application can be found on the e-Government Unit web site.

Ministerial agreement has been reached that Directgov should build on the proof of concept to establish a full, robust business providing government with a primary electronic destination for citizens. It may, in fact, be cheaper for a provider to use an intermediary or Directgov or Businesslink.gov than to create its own delivery mechanism. Information on service architecture and channel costs, gathered in previous steps, may indicate that utilising government's key delivery mechanisms is a more effective strategy than further developing existing e-channels or implementing new ones for a given service. Once this step has been taken, providers can turn to customer/channel analysis.

Checklist

- Have you considered deploying your services across a full range of channels?
- Have government's delivery mechanisms been assessed to see if they can deliver comparably to your own front-end's transaction and performance capability?
- Have you identified how intermediaries can market your services to customers or even offer them in their own right? There are two levels of intermediation that need to be considered – service intermediation and distribution intermediation.
- Have you established an intermediated services development team and process? The e-GU can assist in doing this.
- Is Directgov/Businesslink.gov built into your e-Government service delivery marketing plan and are you leveraging it to best effect?
- Have you considered/calculated what additional take-up you could achieve or (if you are already making use of government's delivery mechanisms) might expect through Directgov/Businesslink.gov and correlated that with the take-up modelling associated with them?

⁵Guidance on Carrying Out End-to-End Reviews, Office of Public Services Reform, May 2003

- Do any plans for developing the front-end of new services involve the development or employment of e-channels?

4. Analyse channels: for usage by customers, suitability for transaction type and for cost of implementation

There are eight principal channels around which a Channels Strategy should be based. Analysis of these channels should consider the following:

- Capability of the channel
- Channel's suitability for particular transaction types.
- Cost of the channels, infrastructure, software and marketing
- Usage of the channel by identified customer segments

The generic capability of channels varies significantly. The technologies that enable them may have been designed to deliver specific functions e.g. the European mobile phone system can provide text messaging but only for messages of a limited length. Some kiosks only give information and cannot print advice or allow emails to be sent. Some channels e.g. mobile phones are very personal and have small screens, while others have multiple or even simultaneous users, such as DTV. Consider the technological maturity of a channel. Some are relatively new and may attract more headlines than users. Online bank Egg.com developed a digital TV channel hoping that it would be used by its 3m customers, however, only about 3,000 used it and recently (April 2004) the company decided to close it down.

The user-base of existing channels should be quantified and the usage behaviour analysed. Both academic and commercial researchers conduct surveys of usage levels and behaviour. There may be no need for a provider to commission its own research. Analysis of usage and behaviour may correlate insights gained elsewhere into the channel's capacity or, if they are segmented, provide insight useful for a provider's own customer segmentation work.

Just because a channel can support a function does not mean that it should. Application forms can be downloaded to a mobile phone but its interface makes it time-consuming to fill a form in. Use a mobile phone where it offers an advantage, e.g. making time-critical purchases, such as paying a traffic congestion charge.

5. Map to decide channels: map knowledge of services, customers and transaction

The four stages outlined above will have produced knowledge and insights about:








- A service, its business processes and its transaction types
- Customer segments and their behaviours
- Capabilities and suitability of channels
- Costs

It is now possible to map these across one another to arrive at an informed channel decision. This mapping occurs in eight stages outlined below

Channels Decision Framework: a worked example












Stage 1: List possible channels

The table below represents a choice of channels

					TXT		
Post	Face to Face	DTV	Web	Phone	Mobile	Kiosk	Fax

Stage 2: Identify which channels are used by the customer. Repeat for other segments












To the table has been added the channel preferences of two customer segments.

						TXT		
Segment 1								
Segment 2		Declining		Likely in future		Likely in future		

Continued over

Stage 3: Take the various transaction types from your service definition. Through which channels do you currently deliver these transactions?

The table has had added the details about what channels are used to deliver a service and the current mode of delivery.












						TXT		
Segment 2								
Segment 1		Declining		Likely in future		Likely in future		
Info Transaction	✓	✓		✓	✓			
Service Transaction	✓	✓						
Financial Transaction	✓	✓						
Account Transaction	✓	✓						

Continued over

Stage 4: Does it correlate with the current channel usage of the segment and their predicted adoption of new channels? Are any channels at risk of redundancy?

The table below has been annotated to identify:

- Correlations between customer segment channel preference and transaction delivery channels
- Where there is a risk of a channel becoming redundant because a customer segment's usage of it is declining
- Channels that may emerge as popular with a particular segment

						TXT		
Segment 1								
Segment 2		Declining		Likely in future		Likely in future		
Info Transaction	✓	✓		✓	✓			
Service Transaction	✓	✓						
Financial Transaction	✓	✓						
Account Transaction	✓	✓			✓			

Emerging Channels












Risk of Redundancy

Transaction Correlation

Continued over

Stage 5: Identify any opportunities where other channels could support the customer usage patterns and the required transaction types

Additional annotation identifies four opportunities to develop a channel strategy.

						TXT		
Segment 1								
Segment 2		Declining		Likely in future		Likely in future		
Info Transaction	✓	✓		✓	✓			
Service Transaction	✓	✓						
Financial Transaction	✓	✓						
Account Transaction	✓	✓			✓			

Op.4 Ramp-down












Op.1 Web enable these Transactions?

Op.3 Port transactions to mobile?

Op.2 Call centre transactions?

Continued over

Stage 6: Consider channel capacity and cost

						TXT		
Segment 1								
Segment 2		Declining		Likely in future		Likely in future		
Info Transaction	✓	Ramp down & migrate to Web & mobile		✓	✓	Launch new service		
Service Transaction	✓	Ramp down & migrate to Web & mobile		Launch new service	Too expensive to support	Launch limited service		
Financial Transaction	✓	Ramp down & migrate to Web & mobile		Launch new service	Too expensive to support	Launch new service		
Account Transaction	✓	Ramp down & migrate to Web & mobile		Launch new service	✓	Launch new service		

In Stage 5, three opportunities for new channels arose from the knowledge that customer segment 1 uses web (PC) and telephone channels and that Segment 2 is likely to use web and mobile channels in the near future. Investigation of these opportunities should assess the capacity and cost of delivering service via these possible channels. Particular attention should be paid to the future cost of raising awareness of a new channel's existence.

In Opportunity 1, both customer segments make use of or are likely to use the web channel. As this channel has the capacity to conduct all four transaction types, it can be part of a service delivery strategy, subject to service architecture and cost considerations.

In Opportunity 2, customer segment 1's use of the phone channel indicates that a service transaction and a financial transaction could be conducted via this channel. However, cost considerations may exclude this from a service delivery strategy as call centres are often expensive to operate for particular transactions. In this case there is an alternative channel, web, possibly available for use by this segment. There should be a presumption against the call centre option being made available here.

For example, financial transactions may generate more calls as customers check to see if payment has been received or simply to check the state of their account.

In Opportunity 3, customer segment 2's likely use of the mobile channel should prompt an assessment of the suitability of the service's transaction type for the channel.

An information transaction, e.g. viewing introductory content, is possible in the mobile channel. However, the volume of information sent should not be large.

A service transaction, e.g. requesting an application form, is possible in the mobile channel. However, fulfilling the request by sending the form to a mobile device is not practical.

A financial transaction, e.g. paying a bill, is possible in the mobile channel, particularly if it is a distress payment made under time pressure.

An account transaction, e.g. checking status, is possible in the mobile channel.

In Opportunity 4, customer segment 2's usage of the face-to-face channel is declining. It should be re-assessed for viability if usage levels continue to fall.

Output from the channels decision framework is now possible. It will give a direction that a channel strategy can take and be built upon. In this example it would involve:

- Enabling all transaction types in the web channel. Both customer segments 1 and 2 are using, or will use, this channel.
- Enabling certain transactions types in the mobile channel for customer segment 2 as they are likely to use it.
- Ramping down the face-to-face channel due to cost of supporting declining user base. Segment 1 and 2 customers are still serviced by post and will have a choice of web, telephone and mobile channels going forward.

The benefit of this particular direction is as follows:

- Cost saving from ramping down redundant channel
- Increased channel choice for customers improving satisfaction
- Avoid usage of a channel that employs expensive call centres

Stage 7: Build-out a service delivery strategy

The channels decision framework has provided a direction for the provider to utilise channels to deliver. A fuller service delivery strategy now needs to be built out to address channel migration and management. Sections 2 and 4 of this document address these topics in more detail.

Appendix 1

Attributes of a high-quality channels and take-up plan: Service Delivery Strategy and Plan Checklist

Area	Requirement	Quality Criteria
1. Baseline – current delivery model	1. Service(s) clearly documented	<ul style="list-style-type: none"> End-to-end service definition available Business process, sub-processes and transaction types documented
	2. Customer base for each service identified	<ul style="list-style-type: none"> Existing customer base segmented and characteristics understood
	3. End-to-end service delivery channels and operational processes clearly documented with associated metrics (transaction cost, customer satisfaction, productivity, etc.)	<ul style="list-style-type: none"> Transaction cost per channel understood Customer satisfaction surveys available Productivity measures and targets in place (e.g. staffing levels, performance, quality, etc.)
2. Target delivery model	1. Clear, high-level articulation of service proposition, which demonstrates its value to both the customer and the provider	<ul style="list-style-type: none"> Service proposition based on customer needs analysis balanced with the need to achieve organisational objectives Stakeholder and focus groups involved in developing service proposition Service proposition tested with customer base and/or intermediaries Value to customer expressed in terms, for example, of being easy/easier to use, time-saving, cost-saving i.e. 'better' Value to provider expressed in terms, for example, of reduction in transaction cost/cost of rework, staff redeployment and/or the achievement of policy objectives
	2. Service(s) clearly documented	<ul style="list-style-type: none"> End-to-end service definition available Business process, sub-processes and transaction types documented

Area	Requirement	Quality Criteria
	3. Customer base for each service identified	<ul style="list-style-type: none"> • Target customer base segmented to identify real differences in customer needs or requirements, and to understand customer access limitations and preferences, for example: <ul style="list-style-type: none"> • The accessibility of a channel to its target customer segment • The propensity of the target customer segment to use it • Those customers able to make use of self-service delivery • Use of common segmentation criteria, where customer base is shared with other services, business units and departments

Area	Requirement	Quality Criteria
	4. End-to-end service delivery channels and operational processes clearly documented with associated metrics (transaction cost, total cost per service, value to provider and customers, customer satisfaction, productivity, etc.)	<ul style="list-style-type: none"> • Service delivery channels, operational processes and standards are capable of meeting the expectations set by the service proposition and service marketing • Services designed for delivery in a multi-channel e-enabled environment from day one • Customer requirements at the heart of the design process • Understanding of the cost of each channel to government and value to customers • Makes maximum and creative use of potential of intermediaries to improve or accelerate take-up and/or efficiency savings before committing government spend • Makes maximum and creative use of opportunities for self-service delivery • Services designed and delivered using Government Service Components e.g. single cross-government registration and enrolment system • Consideration and incorporation of implications/impact of related initiatives • Consistent approach to customer segments across government • Services to be delivered via Directgov and/or Businesslink.gov • Where delivery via Directgov/Businesslink.gov is not immediately possible, services built and designed so they can be easily incorporated at a later date • Operational environment/contingency plans capable of reacting to peaks and troughs in demand • HR policies and plans ensure that staff can support the delivery of the service proposition
3. Migration	1. Proactive strategy for migration of customers to cheaper channels	<ul style="list-style-type: none"> • Inhibitors to change are understood • Appropriate use of incentives and compulsion • Service marketing approach capable of achieving take-up by different customer groups • Service marketing approach has been benchmarked against relevant best practice in both the public and the private sectors • Marketing plan aligned with Directgov/Businesslink.gov
	2. Business transformation plan	<ul style="list-style-type: none"> • Targets and trajectories set for

Area	Requirement	Quality Criteria
	that supports the delivery of the service proposition	<p>customer usage of services via new channels covering a period of 5-7 years, including sensitivity analysis and supported by current and future access forecasts</p> <ul style="list-style-type: none"> • Addresses service delivery via Directgov and/or Businesslink.gov • Dates for winding down or phasing out more expensive channels are stated on a service-by-service basis • Addresses reduction in number of departmental websites • Supports the management and measurement of delivery of services via multiple channels • Supports the measurement of customer satisfaction • Plan makes sufficient provision for the resources required to effect customer channel shift, and make provision for mitigating these costs (e.g. by drawing on the marketing budgets of intermediaries or partners) • HR policies and plans ensure that staff can support customer migration and business transformation • Inhibitors to change are understood • Consideration and incorporation of implications/impact of related initiatives • Adoption of relevant best practice from both the public and the private sectors
4. Benefit realisation	1. Benefit realisation plan with clear linkage between take-up and efficiency savings	<ul style="list-style-type: none"> • Benefits to be achieved are clearly articulated • Consistent with committed efficiency savings • Clear ownership of benefit realisation plan • Efficiencies claimed for other departments and local authorities are explicitly built into their plans with clear ownership • Critical success factors used to identify performance measures • Realistic appraisal of time taken to realise efficiency savings, given that short-term effects of migration are likely to be duplication of function/capacity and probably cost • Adoption of relevant best practice from both the public and the private sectors
	2. Identified SRO who is	<ul style="list-style-type: none"> • SRO has authority to drive change

Area	Requirement	Quality Criteria
	accountable for the efficient end-to-end delivery of a high-quality service	within provider irrespective of organisational boundaries <ul style="list-style-type: none"> • SRO has senior-level sponsor
	3. Clear governance arrangements	<ul style="list-style-type: none"> • Governance arrangements ensure that the SRO can achieve his/her objectives

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