

**South Lakeland District Council**  
**Cabinet**  
**Wednesday, 20 October 2021**  
**Council**  
**Tuesday, 14 December 2021**  
**Customer Connect five years on, the outcomes,  
benefits and future**

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**Portfolio:** Leader of the Council  
**Report from:** Chief Executive  
**Report Author:** Claire Gould – Operational Lead for Customer and Locality Services  
**Wards:** (All Wards);  
**Forward Plan:** Not applicable

**Links to Council Plan Priorities:**

To deliver the vision: Through the Customer Connect programme we have put in place state of the art information technology, new ways of working and modern offices. This is about putting the customer, at the centre of everything we do. We have made it easier to get the services and information customers need from the council. We are cutting bureaucracy and form filling both for customers and in our own processes and procedures. We are ensuring that customer feedback drives improvements to how we do things.

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**1.0 Expected Outcome and Measures of Success**

1.1 To recognise the achievements of the Customer Connect Programme since inception in 2016 and to note the outcomes and benefits the programme has delivered as set out in Appendix 1 of this report. To understand the work still to be completed and how that is going to be delivered over the next 18 months.

**2.0 Recommendation**

**2.1 It is recommended that Cabinet:-**

(1) **note the outcomes and benefits of the programme as set out in Appendix 1 of this report**

**2.2 It is recommended that Council:-**

(1) **note the outcomes and benefits of the programme as set out in Appendix 1 of this report**

**3.0 Background and Proposals**

3.1 In the 2015/16 Council Plan it stated that through our Customer Contact Strategy we would embrace new technology to improve access to services for our customers. Staff and Members visited other councils who had transformed their organisations to deliver new ways of working centred on the customer. When they reported back it inspired the

creation of a Programme Definition Document, which was approved in July 2016 at the first Customer Connect Board meeting. The report set out the governance, scope and deliverables over a four year period of transformation. The key elements of the programme were centred on Digital, People and Place and a business case for each was agreed at Cabinet between 2016 and 2020.

- 3.2 The report in Appendix 1 'Customer Connect Five Years On' is a review of the original programme definition and the business cases for the three work streams, Digital, People and Place. The review findings on what we set out to achieve, what we have achieved and what still needs to be delivered forms the basis of the report.
- 3.3 Due to the Pandemic the programme was delayed by 12 months affecting the transition of Phase 2. This was due to staff time required to deal with the initial emergency situation and then the ongoing resilience needed to support communities and businesses. As a result there is some activity that still needs to be delivered as set out in Section 7 of the report and in Section 8 it describes how it will be delivered over the next 18 month period.
- 3.4 How the programme will be managed going forward is in recognition of the Local Government Review (LGR) outcome. At the Customer Connect Member Steering Group it was recognised that there is still an importance to continue the work of the programme and not lose sight of the final outcomes and benefits to be achieved. Therefore the recommendation to manage the Customer Connect Programme within a Portfolio Management approach alongside the LGR programme, other council projects and business as usual work was agreed.

#### 4.0 Appendices Attached to this Report

Appendix No.	Name of Appendix
1	Customer Connect Five Years on Report

#### 5.0 Consultation

- 5.1 This report has been developed with the cooperation of key staff involved in the implementation and delivery of the Customer Connect Programme and Cabinet Portfolio Holder Members who were part of the Customer Connect Steering Group.

#### 6.0 Alternative Options

- 6.1 Not applicable

#### 7.0 Implications

#### Financial, Resources and Procurement

- 7.1.1 There is a revenue budget carry forward from 20/21 due to the delay of Phase 2 of the programme for Digital development and staff training. Details can be found in section 8 of the report. There is also a Capital budget to support the continued development of digital systems.
- 7.1.2 As set out in section 6 of the report, the projected salary savings of between £1.545m and £1.642m have been delivered compared to a target of £1.55m. The savings are expressed as a range as it is not practical to track the savings on a person-by-person basis due to other salary changes taking place at the same time, include the new national pay scales and personal incremental progression.
- 7.1.3 When the total spend to date and the budgets remaining are compared to the total business case approved for People and Digital (£3.848m) and Places (£4.937m) the total spend is slightly lower (£8.629m) than the total approved (£8.785m).

## Human Resources

7.2 Staff are already identified and involved in the programme work streams. They will continue in those roles until the programme is closed.

## Legal

7.3 There are no legal issues in relation to this report.

## Health and Sustainability Impact Assessment

7.4 Have you completed a Health and Sustainability Impact Assessment? No

7.5 Not applicable

## 7.6 Equality and Diversity

7.7 Have you completed an Equality Impact Analysis? Yes (attached at Appendix 2)

7.8 Summary of Equality and Diversity impacts

Please indicate: P = Positive impact; 0 = Neutral; N = Negative; Enter "X"					
Age	P	X	0		N
Disability	P	X	0		N
Gender reassignment (transgender)	P		0	X	N
Marriage & civil partnership	P		0	X	N
Pregnancy & maternity	P		0	X	N
Race/ethnicity	P		0	X	N
Religion or belief	P		0	X	N
Sex/gender	P		0	X	N
Sexual orientation	P		0	X	N
Armed forces families	P		0	X	N
Rurality	P	X	0		N
Socio-economic disadvantage	P		0	X	N

Risk Management	Consequence	Controls required
There are competing priorities with LGR that risk the programme not being delivered.	The customer won't benefit from continued online digital services	A Portfolio Management approach has been adopted to prioritise and manage all activity across the organisation

## Contact Officers

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## Background Documents Available

Name of Background document	Where it is available
Digital Business Case	<a href="#">Digital Business Case report (March 2016)</a>

<b>Name of Background document</b>	<b>Where it is available</b>
Customer Connect Programme Business Case	<a href="#">People Business Case (June 2018)</a>
Place Business Case	<a href="#">Place Business Case report 1 (Feb 2019)</a> <a href="#">Place Business Case report 2 (March 2020)</a>

### Tracking Information

<b>Signed off by</b>	<b>Date sent</b>	<b>Date Signed off</b>
Section 151 Officer	23/09/2021	04/10/2021
Monitoring Officer	23/09/2021	05/10/2021
CMT	23/09/2021	23/09/2021

<b>Circulated to</b>	<b>Date sent</b>
Lead Specialist	23/09/2021
Human Resources Lead Specialist	23/09/2021
Communications Team	23/09/2021
Leader	05/10/2021
Committee Chairman	
Portfolio Holder	
Ward Councillor(s)	N/A
Committee	N/A
Executive (Cabinet)	
Council	