Appendix E5
South Hams District Council
Business Case Outline

The Business Case is used to obtain management commitment and approval for investment in business change including projects and programmes, through rationale for the investment. The Business Case provides a framework for planning and management of the business change. The ongoing viability of a project or programme will be monitored against the Business Case.

Future IT and Customer Services development			
Senior Responsible Officer:	Steve Mullineaux	**Project Sponsor ELT Member:**	Jim Davis
Date Updated:	20/10/2022	**Version:**	2.0
Programme/Project Description:	Provision of software robots to automate admin processes		
Reviewers:			
Author(s):	Jim Davis: Head of Customer Service Improvement		

Guidance

An outline business case is a document setting out the initial justification for investment of resources (people, time and money) into a project or change being considered. This outline business case is to be completed at the initial idea stage of any project.

Once approval has been given to the outline case, solution design work will begin and the project will undertake a more detailed Business case setting out full implementation and business running costs, the benefits of implementation and an assessment of how implementation would be managed and the associated change risks and issues.

Capital projects will be scored on the following criteria:

• Health and Safety compliance
• Essential to keep operational assets open
• Fit with the Council's Delivery Plans for 'Better Lives for All
• To rationalise service delivery or service improvement
• To generate income, capital value or to reduce revenue costs

It is important that future bids for capital are aligned with the review of the thematic delivery plans and aims within 'Better Lives for All'.

1. Project Summary – Project objectives and what it aims to achieve.

There are two parts of the application. Provision of software robots to be utilised by multiple service areas to automate tasks. These will be actively utilised to speed up tasks at point of use (CST, for example, allowing quicker return to phone calls), and passively utilised to automate admin tasks (moving data from customer submissions into back office systems).

Licensing of a secure payments system to speed up CST call/wrap time.

2. Why we need the Project – Background and problem/opportunity to be addressed.

One approach to improvement is the use of capital to replace labour and effort to increase productivity per unit of time. Software robots achieve this aim not by improving or changing processes but by moving work from higher cost employees to automation software that can work 24/7. We have had limited success with this in the past but they were bought to solve a singular problem rather than being multi-functional, and focused on solving entire problems rather than reducing effort and use in a mixed environment. They provide benefits in three main ways; automating data entry and repetitive tasks, reduce licensing costs as 1 login can return information for 20+ CST staff rather than a license for each staff member, live support for CST when entering information on multiple systems. The software can be tasked to perform the same tasks as a normal API integration without needed IT support or maintenance by interacting purely through the front end of different systems. The software can be tasked 24 hours a day to complete work in any applicable system.

This project delivers a best in class solution to speed up phone calls and ensure swifter payments.

3. Project Scope – State what's IN and OUT of Scope.

Assessment of software automation from multiple suppliers.

4. Benefits – Brief indication of any potential financial and non-financial.

Quicker call and wrap times with additional customer support as customers can receive live support throughout the process rather than being handed off to another line. 0.2-0.3FTE time saving in CST (4-5mins on wrap waiting for payment to complete currently).

Software automation, when coupled with intelligent processes, has the potential to save around 5 FTEs across the authority if applied to all relevant based on existing processes. Redesigning processes to enable further automation would deliver further benefits. Eliminating the need for direct API integration would reduce IT workload in delivering integration and ongoing support.

5. Links and Dependencies – To other projects currently live.

Linked to Future IT program and integrates well with Liberty Create. Will add a significant additional benefit to the Revenues optimisation project and the EH & Licensing project currently being scope and being delivered Q4 22/23

6. Risks – Note of any significant potential risks.

Expected time savings may not materialise, but the range of possible applications make this unlikely. IT software automation may be spread across a large number of roles so driving cashable savings.

7. Project Resources – What people will the project need?

Business Development Team, IT infrastructure and applications support, CST Team Leaders

8. Explain how the project meets the five criteria listed below.

Health and Safety compliance	Reduce risk of data breaches and risk of error by individual officers. Repetitive tasks reduced, enabling staff to focus on what matters.
Essential to keep operational assets open	
Fit with the Council's Delivery Plans for 'Better Lives for All'	Improving Council Services
To rationalise service delivery or service improvement	Reduces CST effort and automates tasks delivered by Case Managers currently. By removing basic tasks it delivers significant capacity improvements and focus on value adding work.
To generate income, capital value or to reduce revenue costs	Automation actions will have ongoing staff savings that increase as more actions are undertaken. High uptake would enable additional savings and more automation can be purchased as required.

Capital costs and revenue implications

In the table below, please detail the capital budget requirement over the next three financial years as well as any revenue implications (maintenance, repairs, etc…)

Financial year	Capital cost	Revenue implications
2023/24	£25,000	
2024/25		
2025/26		
Total cost	**£25,000**	

Please detail in the box below how this project will be financed:

Financial Year	Capital grants/ contributions	S106	Reserves	Capital receipts	No funding source identified
2023/24			£25,000 New Homes Bonus funding		
2024/25					
2025/26					