Example: Overcoming usability issues at Rochdale MBC

The background

In April 2008 Rochdale procured the Benefits Electronic Claims System (BECS) from Team Netsol after a tender evaluation by a third party (Agilisys, who were in partnership with the council at the time), but the web team was not involved. BECS is now used by over 60 local authorities and was supported by DWP under the Performance Standards Fund.

BECS did not, however, go live until February 2009, a delay primarily due to internal difficulties with the ICT function. The implementation consisted mainly of plugging BECS into the council website with little attention paid by the web team to user testing and usability of the whole customer experience.

In 2011, a new web manager was appointed. One of her first tasks was to build up the online take-up of BECS. The business case for this project indicated that at best only 28% of claims were then being made online and set a target of 60%.

A service with usability issues

This is a story of how with determination and passion one can overcome barriers to achieving usable online services, even in sensitive areas such as housing benefit claims.

 Often the problem lies in poor procurement and/or implementation practices, which result in third party software being added into websites as is, without proper consideration of its usability by the public. Most web managers in this position will accept the situation with some reluctance, believing that there is little that they can do to change things, especially if the supplier has many customers thought to be satisfied with the software.

 This case is an example of what, given the will, the web manager can do to change things.

The usability issues resolved

Every situation is different. Here, although BECS itself was working to specification, the online usage was not progressing in terms of take-up.

The new web manager at Rochdale had evidence from the feedback of both staff and claimants that the system did not meet the required standards of usability for use by the public. In her view this was a result of issues both with the council website and with the product itself. From a customer perspective, the facility had to become easier to use, especially as an online housing benefits service was one where many internally and externally believed a take-up of anything approaching 100% take-up to be highly problematic.

Rochdale is an urban area with high levels of deprivation. Some 27,484 people in the borough currently claim housing benefit. Moreover, some colleagues in customer services and revenues and benefits were strongly of the view that benefit claimants in Rochdale would never apply online for housing benefit, some being quite hostile to the idea because they thought that it would threaten their jobs.

Faced with a major challenge, the web manager decided to tackle, first of all, the usability of the total system, believing strongly and rightly that the online facility just had to be easy to use, if she was to succeed in achieving her objective of persuading all claimants to go online.

Many issues related to the website; some related to the product being used. Team Netsol were provided with a list of issues which they were keen to resolve. The supplier was very receptive to the process and accepted most of her suggestions, being equally committed to improving the customer experience.

She then undertook a lengthy process of user testing that included testing with:

- employees in customer services (ie one-stop shop)
- employees in the contact centre (ie over the phone)
- welfare rights advice workers (expert practitioners in this field)
- employees in revenues and benefits
- employees in adult care (who have a role in supporting clients about housing problems)
- above all, claimants at every opportunity.
At each step any issues were identified and put right before the next step. A personal log kept by the web manager is testimony to the hard work and commitment required to make this online task usable. It also makes clear that much of the testing related to the council website, not just to BEGS.

27 April 2011 – Focus group run identify issues with BEGS Claims.
19 April – 6 May 2011 – CSO Staff surveyed to understand what works and what needs improving with BEGS claims.
26 May 2011 – Focus group run to identify usability issues with BEGS Change.
3 June 2011 – Closing date for return of 197 customer surveys.
8 June 2011 – Updated content in Housing Benefit and Council Tax benefit section gone live.

Improvements to the website include:
- Checking and updating the content.
- Bringing together the Housing Benefit and Council Tax benefit sections as one section.
- Removing the duplication between the 2 sections.
- Improving the customer journey to the pages.
- Enabling quick access to top tasks.
- Using more customer friendly writing.
- Creating new content e.g. advantages of using the online form to claim Housing Benefit and Council Tax Benefit.

Further work following usability testing ongoing. Iterative process – plan, do, check, act.

One of the benefits that made the online system easier to sell was a decision to cut down the time it used to take to process the application, based on a suggestion from Team Netsol after experience with another local council. All completed online applications were guaranteed to be assessed within seven working days as opposed to the seven to ten weeks that it used to take if submitting a printed application.

**Electronic signatures**

Another phase was completed for improving further the system with the introduction of electronic signatures in June 2012. This used a new feature provided by Team Netsol from 2010. This new facility meant that claimants were able to submit a signed claim form online. This improvement had benefits for all involved, but again it needed to be thoroughly tested by users.

For customers and landlords, the benefits of using an electronic signature for claimants and landlords include the following:
- Claimants benefit from quicker processing times as the council no longer had to print and send out a declaration form for signing.
- The electronic signature is easy to action, because claimants just tick a box to say that they agree to the content in the declaration.
- Claimants can submit a signed benefit claim online.

For the council, the benefits of using for the first time an electronic signature, rather than a hand-written one, comprise:
- Increased customer satisfaction
- Productivity and effectiveness by reducing operational and back-office procedures and overhead
- Reduced postage costs.

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Promotion and further improvement

After this first phase of overcoming usability problems, the project team initiated a ‘no-cost, low-cost’ promotional campaign. The web manager promoted the benefits of the online facility to claimants and practitioners with this list:

✓ You can make a claim any time 24/7.
✓ You can calculate your benefit online. You can get free internet access at any of our libraries and customer service centres. Staff at our contact centre and our customer service centres (CSCs) will assist you if you need help with completing your online form.
✓ You can instantly find out how much you may be entitled to depending on your situation then make a claim if you wish.
✓ You can check how much you may be entitled to if your circumstances change.
✓ You’ll be informed what evidence you’ll need to complete your claim.
✓ Your claim will be processed quicker if you supply all your pieces of evidence, reducing the number of visits to the CSCs.

Other promotional work included:

- promoting on the website – improved customer journey, adding leader boards and hotlinks, links on key popular pages on the website, creating a website shortcut
- using word of mouth – delivering with passion and pride
- using front-line employees in customer services and the contact centre to promote the benefits
- adding hotlinks in email signatures – all employees in revenues and benefits, service directors, front-line employees and those in customer access
- revising revenues and benefits letters and promoting the online form using a shortcut
- identifying events around the borough and sending a representative
- using the mobile benefits bus
- visiting key organisations
- delivering presentations to key people
- delivering posters and leaflets to key places, eg housing association offices, charities and voluntary organisations, estate agents, customer services and libraries.

A letter from one of the largest local landlords paid the web manager a strong compliment for her customer service.

17 August 2011
Dear Ranna

Re: BECS System & Training

It was good to see you and Suzanne again as part of the ongoing introduction and implementation of the BECS system for RSLs. I would like to thank both of you for the training and information you were able to provide me. Also I was impressed with the knowledge you both had of the system and how easily you could impart that to me to enable me to easily start using it.

On first using the system I found it to be very useful as regards the HB calculator and being able to provide guidance to tenants on whether or not they may qualify for HB/CTB for the property they reside at or may be offered. But more impressively I was pleasantly surprised to find the whole system, when inputting a claim, was extremely user-friendly and above all else simple in functionality. There was a logical process to the inputting of information and clear simple basic instructional notes to each element. The ability to check and/or amend answers to questions and return to the form operates as a smooth yet essential transitional process. Similarly, to be able to save the claim and return at a point in the future to attach further verified documentary evidence in support of the claim is again a simplistic and smooth process. No doubt as I use the system more often in the coming months there may be slight ‘tweaks’ that I would ideally like, but overall, I am impressed with the whole process to date.

Yours sincerely

Harry Turner, Housing Manager
Sportun & Falinge Housing Association
The outcome

The outcome from the whole exercise is that almost all housing benefit claims are now made online, the only exceptions being a handful of claimants each year who are either in hospital or in prison. The council processed 11,972 new claims online in 2012/13. This channel shift was achieved within a very short period of six months and is believed to be one of the highest levels of online take-up across the UK in the shortest time.

Other benefits that this has helped to deliver include:

- reduction of face-to-face contact by approximately 70%, leading to fewer staff, closing of buildings and integration of customer services in libraries
- improvements in face-to-face contact with waiting times reduced and more effective management of demand (eg use of triage and appointments)
- reduced workload in the back office for revenues and benefits (eg fewer claims coming in as use of the calculator function eliminates potential claimants and time spent in assessing and validating claims rather than manually entering them into the system)
- getting more customers doing things online helps realise channel shift benefits in other services.

The supplier perspective

When asked about his perspective about this exchange with one of his customers, the product manager at Team Netsol confirmed that the comments made by the Rochdale web manager has led to clear improvement with the product, although other customers had not made them. The supplier had responded positively to the web manager’s obvious determination to improve the customer experience based on her evidence that landlords, tenants and council employees had all tested the service and had made the suggestions for improvement.

‘Rochdale’s web manager, Rahna, took a grip of the usability issues, which meant the system wasn’t being used to its full potential and take-up was lower than experienced at other customer sites. Working closely with her on the customer journey was an extremely useful exercise with many lessons learned. We took on board the suggestions and it has benefited all of our customers and has transformed Rochdale into a flagship site. We positively encourage feedback from our customers to help improve our products and we now regularly perform post-implementation take-up reviews as part of our delivery process.’

Greg Clarke, Managing Director, Team Netsol

‘The council has been working hard to make the access of services online easier for residents and promoting digital inclusion. What we have already achieved, especially with disadvantaged communities is fantastic, but we know there is more to do. With the help of our residents who have taken part in focus groups and user testing, we are making further improvements and the feedback we are receiving is very positive. We look forward to further improvements and getting more people doing more online and realising its benefits. We are determined to take advantage of digital technologies to deliver simpler and more effective services to users.’

Councillor Peter Williams, Deputy Leader and Cabinet Member for Economic Development and Customer Service

Socitm Insight comment

Many times in our Better connected reports we have commented adversely on third party software, being poorly integrated into the council website. The problem often lies with the software itself, but sometimes with the way that it is integrated, and we have been able to illustrate both good and poor practice using the same software.

We have, however, never come across until this occasion such an example of determination and leadership from the web manager to act as advocate for the customer. Over this period DWP was setting up 13 trials across the UK to help councils prepare for a ‘digital by default’ universal credit scheme by helping claimants for housing benefit and council tax go online (see section 4.14 for more details). Yet one council had already beaten those councils, and, probably almost all other councils, to achieving nearly 100% online take-up within just six months!

This reflects well on the individual concerned refusing to give up on a level of online take-up that was not improving as it should, for whatever reason, and believing that usability was the key to the problem. It also reflects well on a supplier who responded positively to the web manager.

In the long term, however, the greatest impact of this achievement may well be that it demonstrates to the whole council that it can deliver successfully a significant digital service in an area that is sensitive and complicated to administer. In this sense, this has become a flagship project within the council.