Civica helps Basingstoke & Deane Borough Council to overcome resource squeeze

PTC automation boosts efficiency, making more time for customers

In common with much of the public sector, over the last couple of years the Revenues team at Basingstoke & Deane Borough Council has faced an increased workload and a squeeze on resources. In short, they have had to find ways to do more with less. So they turned to Civica, whose OPENRevenues product they have been using for some 20 years, to find ways to increase the efficiency of council staff and processes.

Mundane, repetitive tasks were sucking up time and resources

Two years ago, Basingstoke's core Revenues team had 10 staff, today there are just 8. Performance targets – such as those relating to the speed of response to telephone calls and mail – have remained constant, however.

Unsurprisingly then, the attention of Basingstoke's Local Tax Team Leader, Lucy Gallyer turned to making her team members more efficient without compromising service to the public. For one thing, she recognised that staff were spending the first couple of hours of each day on essential but low-valued-added work before getting to the important parts of their jobs.

So reducing the time spent on these mundane tasks became a priority. They analysed the regular work of each team member to see which manual processes could be automated. That would free up staff to spend more time with customers and to work on revenue enhancing tasks such as debt recovery.

Automate the tasks that don't require human intervention

While Basingstoke's core OPENRevenues application includes basic job scheduling capabilities, it still required a lot of manual input. So Basingstoke turned to two modules in Civica's PTC suite.

The job-scheduling component of Civica OPENRevenues was replaced by PTC Scheduler, a task management tool that fully automates the scheduling and running of batch processes, eliminating much of the manual input that is otherwise required. That allowed a number of key processes, including direct debit runs, refund and recovery processes and year-end processing to be fully automated.

And to eliminate the manual input involved in some of the essential periodic reconciliations such as the daily cash reconciliation, Basingstoke added PTC Consolidation. This module allows spreadsheets to be maintained dynamically and automatically and can deal with data from a wide range of input sources.

"We had the highest collection rates ever last year because the team had more time to spend on debt recovery."

Lucy Gallyer
Local Tax Team Leader
Basingstoke & Deane Borough Council

Increased efficiency and customer service with fewer staff

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Civica's PTC

▶ **Removes the need to manually run numerous small tasks like banking processes (direct debit runs, debt consolidation checking, refunds etc.)**

▶ **Ensures completion of all back-office tasks**

▶ **Frees up resources through automation of back office processes**

▶ **Boosts staff productivity**

▶ **Reduces error rates**

▶ **Frees up time to clean up databases**

▶ **Improves service levels to customers**

▶ **Frees resources for revenue enhancing activities.**

Automation saves the equivalent of a full time employee

Lucy says: **"It' s taken away a lot of those mundane tasks from the team so they can focus on more productive work."** Automating the daily cash reconciliation alone saves around 30 minutes each morning. Overall, she calculates that the time saving equates to around one FTE staff member.

That translates into a better service for Basingstoke residents – for example enabling the department to meet the telephone response and mail turnaround targets.

Lucy says that: **"Customers have fewer problems because we've got more time to spend on their accounts. There's a smaller backlog and we get fewer complaints as a result. It's a better service to residents."**

Freeing up staff time to focus on value-added activities has yielded tangible financial benefits as well. Lucy says that: **"We had the highest collection rates ever last year because the team had more time to spend on debt recovery."**

Civica's support and public sector experience have been valuable assets for Basingstoke

Lucy has been pleased with Civica's support during the PTC implementation process. For example, some of the modules have been customised to meet the council's specific requirements. They have also appreciated the opportunity to be part of a Civica run PTC User Group, which has proved to be a great source of ideas.

As Lucy says: **"It motivates you to think 'yes, we could do that as well'. It's a great way of learning."** She concludes that: **"Civica is definitely very responsive to our needs."**

The background and experience of Civica staff in the specific area that they work in was also important. She says: **"A lot of Civica people used to work for councils so they know what**

we're talking about, what the issues are and have useful suggestions. It's nice to talk to someone who has been in our shoes."

In a broader sense, Lucy appreciated Civica's wide local authority customer base, which means that they are able to see how others tackle the same tasks. She says: **"From their work with other councils they are able to give us suggestions for things we could do as well. The account manager is very helpful when we have a problem since she'll usually know someone who has faced the same issue."**

The next step: more scope to raise efficiency with additional PTC modules

Lucy sees the potential for the Civica PTC software to be utilised elsewhere in Basingstoke Council, particularly as they have employed a digital transformation specialist. And building on the success of Scheduler and Consolidation, Lucy is eyeing additional PTC modules for introduction in her own Revenues department in the next year. The first two on the list are PTC Rollover and PTC Dashboards.

Rollover is designed to tackle the end of year work. As Lucy says: **"That should save us lots of time. Year end reports take a long time to set up so we want a system that already has them set up we just tick the ones we want."**

Dashboards, meanwhile, presents a range of key data points on a single screen, for example collection rates, top 10 debtors, money outstanding, residents who need to be 'phoned that day and people whose direct debit has bounced. For Basingstoke, whose system has been in place for 20 years and contains vast amounts of data, the ability to do that will be invaluable. Especially so for managers who need the big picture numbers and don't need all the detail.

As Lucy says: **"It will mean they can spend time looking at the data and understanding it rather than just running it."**