

## Eastleigh Borough Council – improving revenues & benefits

### Introduction

The Borough of Eastleigh is situated in central southern Hampshire and borders the eastern edge of Southampton City Council together with the District Authorities of Fareham, Test Valley and Winchester.

### The Challenge

Andy Butler, Programme Coordinator, was brought in to look at the feasibility of implementing EDRM as a corporate solution. The Council's objective was to improve customer service by improving access to information, creating more effective electronic storage and improving Council efficiency by freeing up staff time to perform more complex duties.

Eastleigh required an EDRM system that would work across the Council. This meant that as well as covering the following high level requirements, the system also had to be user friendly and a fully integrated EDRM solution.

- Faster, more consistent responses to customers/enquiries
- Improved cross-unit working and integration
- Efficiency savings in staff time
- Reduction in storage requirements
- Improved workflow capabilities
- Reduction in paper usage and posting costs
- Security over document access and modification
- Improved working environment and improved retention of staff
- Compliance with government legislation
- Improved risk management and audit trail
- Improved information management - ability to performance manage

### The Solution

A key point in the Tender for the solution was the flexibility for the system to be used across all units in the Council. To achieve that, integration capability was important, as was partnership working. Eastleigh required a supplier they could work in partnership with, getting the best out of the system for the entire Council whilst developing individual customised solutions for each unit.

This is one of the primary reasons why Eastleigh chose the IDOX EDRMS and Workflow systems.

### Revenues and Benefits

The first stage of the project was to roll out IDOX into the Revenues section of the Revenue & Benefits Unit with the second stage to roll it out into Benefits.

With great overall processing times, the Eastleigh Revenues section's main concern was to streamline their business processes. The implementation of IDOX has freed up existing staff time allowing them to invest in other activities. An example of this was that managers would spend at least 2 days per month collecting statistics which now takes seconds.

**“The implementation of IDOX has increased the section's productivity, efficiency and effectiveness.”**

**Lesley Cox, Revenues Manager**

In the first three months, Eastleigh have scanned more than 214,000 images for the benefits implementation (both new documents and back scanning) this is enough paper to cover 1½ football pitches. These are all documents that would have previously been kept and stored on site in filing cabinets.



# Case Study

## Integrations

Lorraine Radford, a prominent figure in the Revenues and Benefits world, who is also the Head of Revenues and Benefits at Eastleigh and the Chair of the Academy Southern Benefits User group, had high expectations of how she wanted the system to work and the integrations that IDOX group would be able to provide with the Academy back office System.

**“It is already evident that efficiency has improved through the way in which we can now manage and prioritise our workload more effectively.”**

**Staff have embraced the system and morale has noticeably improved since we started using IDOX.”**

**Andy Butler, EBC Programme Co-ordinator**

At Eastleigh, Academy batch programs are the basis for a vast amount of work within the Revenues section. Working in partnership with Eastleigh, IDOX group were able to develop an Academy report loader that splits Academy reports into individual work items. This means that batch reports and other documents such as Consultation papers, Service Level Agreements with the VOA, Bailiff Data, Valuation Schedules and DWP, and the payment schedules will be available in IDOX directly as work items.

This valuable faculty which allows work to be sent directly from Academy into IDOX means that where it could take someone 2-3 hrs per day to sort and allocate the batch work, it will now take just minutes. Rather than three staff members dealing individually with one case, IDOX group matches them up, allowing one user to look at the three report items on a single case at once, thereby cutting down on valuable processing time.

**“From a manager’s point of view, it’s reduced the statistics they have to maintain, they can monitor what’s in the work queue much more easily.”**

**Andy Butler, EBC Programme Co-ordinator**

## Partnership Working

IDOX group and Eastleigh worked in partnership to customise the IDOX DMS and Workflow, so that the system is produced to the Council’s strict requirements. Eastleigh felt that they worked as part of a team to deliver the solution rather than as two separate identities. Eastleigh has a dedicated Project Manager and the IDOX group Project Manager is available on-site regularly.

## The future for IDOX group and Eastleigh BC

In the Revenues and Benefits Unit, Eastleigh is looking to further expand their use of the IDOX system to both the benefits and Concessionary Fares sections. They intend to transfer as much information as possible into IDOX including the use of templating to create and produce forms, and using the reporting options to calculate the daily income balancing.

The rollout of the IDOX system in Revenues and Benefits has allowed Eastleigh to review and improve their current business processes for both efficiency and performance in Revenues and Benefits. Eastleigh will be able to use the lessons learnt so far by continuing to corporately re-engineer the business process across the Council as part of the Council’s wider efficiency agenda using IDOX software.

In the future Eastleigh will focus on how information is passed and handled internally and how they can use the IDOX system to improve it. Eastleigh intends to improve performance and effectiveness as this is vital to better customer service. For Eastleigh at the end of the day that is paramount.

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