Customer First

Customer First Health Review – Report

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Table of Contents

s 47C

Executive Summary

Customer First is the overarching platform that will provide the foundation of the department's new integrated IT solution. It will improve the service DHS provides to its customers and change how business is done across the department.
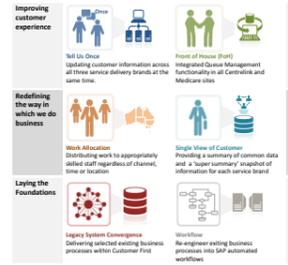
Over the last 10 months important Customer First building blocks have been realised by the project. A number of complex solutions that impact a large proportion of DHS staff across the country were designed, built and implemented in a relatively short timeframe.

1 Introduction

1.1 Customer First

Customer First is the overarching platform that will provide the foundation of the department's new integrated IT solution. It will provide an integrated user interface and work management system, used by all service delivery staff across DHS.

Customer First is being designed in consultation with staff, to meet the needs of staff, customers and more broadly the department. It will assist in implementing the SDR agenda, improving customers' experience and the way business is done across the department. Customer First is being released across in a number of stages, with more functionality and improvements being continually added to the tool, piloted, and rolled-out nationally.

Customer First is more than just a system. It consists of multiple building blocks that together improve the service the department provides to customers and changes the way in which business is done. Customer First is about bringing information for a customer together and creating a 'Single View of a Customer', but it is also about easily distributing work to the most appropriately skilled staff regardless of channel, time, and location.

The main building blocks are summarised in the picture below.

Improving customer experience	**Tell Us Once** Updating customer information across all three service delivery brands at the same time.	**Front of House (FoH)** Integrated Queue Management functionality in all Centrelink and Medicare sites
Redefining the way in which we do business	**Work Allocation** Distributing work to appropriately skilled staff regardless of channel, time or location	**Single View of Customer** Providing a summary of common data and a 'super summary' snapshot of information for each service brand
Laying the Foundations	**Legacy System Convergence** Delivering selected existing business processes within Customer First	**Workflow** Re-engineer exiting business processes into SAP automated workflows

1.2 Customer First Health Review

Customer First aims to improve the service DHS provides to customers and how it does business. Important building blocks have already been established, however, to ensure the Customer First platform aligns to user and business needs, a health review has been conducted.

s 47C

1.3 Approach

The comprehensive health review encompassed three different phases and was undertaken by a joint DHS and PwC team.

In the first phase a review framework was developed which provided a clear and consistent structure for data collection and assessment.

As part of the second phase data was collected through document analysis and a user survey s 47C

During the third phase the gathered information was analysed s 47C

1.4 Assumptions and limitations

Our review as presented in this report is based on a number of assumptions and limitations. Several assumptions and limitations are described in subsequent sections of the report at the point at which they are most relevant, but there are three that apply to the engagement as a whole:

- The review team worked under the assumption that documentation provided by the Customer First project team is both accurate and comprehensive.

- The findings are based on a review of the project documents and results of a survey of staff.

- This review was carried out by a joint DHS and PwC team; some of this team has been involved in the development of project documents/processes.

Appendix A – Survey Results

A.2 Survey Results for Customer First (Convergence)

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, we distributed a survey. The survey was designed to obtain a user perspective on the Customer First system, understand user views in relation to functionality delivered to date, and identify opportunities for improvement.
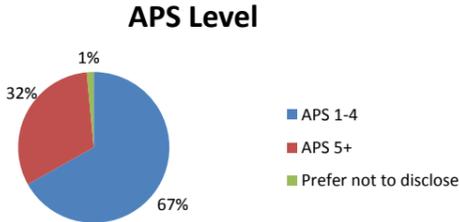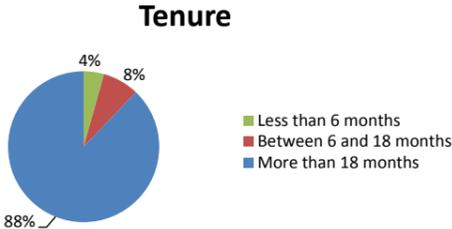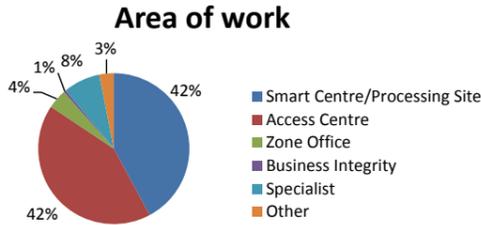
The survey was distributed through the Change Network to 300 users in each of the following Customer First user groupings; Customer First (Convergence), Work Allocation, and Front of House. The actual number of responses exceeded expectations, with 1576 respondents completing the survey, indicating that the survey was distributed beyond the original target group of 900 users.

The results of the survey have been analysed to understand user perspectives on the effectiveness of the delivered Customer First functionality. We have provided a summary of this analysis below.

A.1 shows the demographics of the survey respondents, to add context to the responses against each functionality; in A.2 Customer First (Convergence), A.3 Customer First Work Allocation and A.4 Customer First Front of House.   The survey results are discussed in sections 3.3 and 4.2.
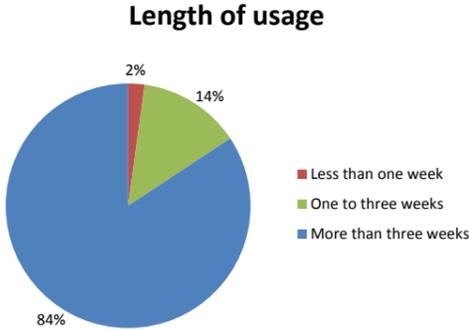
A.1 Demographics

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Area of work

Length of usage

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Tenure

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APS Level

A.3 Survey Results for Customer First Work Allocation

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Length of usage

5%

13%

82%

■ Less than one week
■ One to three weeks
■ More than three weeks

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A.4 Survey Results for Customer Front of House

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Length of usage

3%

13%

84%

■ Less than one week
■ One to three weeks
■ More than three weeks
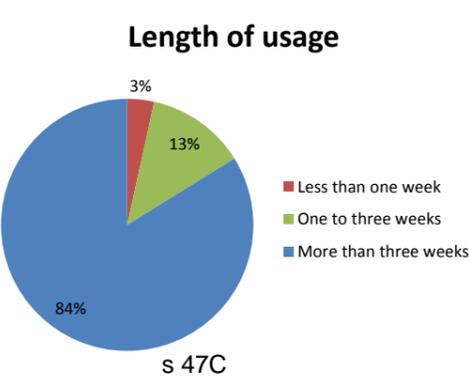
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Appendix B – Functional Requirements Analysis

Summary

Customer First (Customer First) is the overarching platform that will provide part of the department's new integrated IT solution. Customer First uses a commercial off the shelf product, specifically SAP CRM technology. Customer First is being released across the department in a number of stages, with more functionality and improvements being continually added to the tool, piloted, and rolled-out nationally.

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A detailed analysis of delivered functionality was completed by the team or director responsible for the respective Customer First deliverable. For each deliverable a review of the original business requirements was undertaken in order to identify the general positioning of the project, deliverables met, deliverables partially met and deliverables not met. Along with this, the impacts for deliverables either partially or not met were identified and suggested future actions outlined.

s 47C