

Business Matters Phase 2 Report

Status	Author	Version	Date
Draft	Steve Laslett	1.0	12 03 2007
Draft	Steve Laslett	1.1	19 03 2007
Release	Steve Laslett with edits from BM Board	1.2	23 03 2007

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1. PURPOSE OF THIS DOCUMENT

This document is the final report of Business Matter Stage 2 project (BM2). The project received funding from the West Midlands Centre of Excellence RIEP fund. This document and the numerous supporting documents referred to are designed to provide a comprehensive final report to the WMCoE and other stakeholders.

It is anticipated that the report will confirm that overall the project objectives have been met and that valuable progress has been made on behalf of all West Midlands Local Authorities. Much of the work will also benefit all UK Local Authorities. As the project has progressed, the significance of its work is becoming increasingly evident on the national scale. Later sections explain the significance of the work to national agendas such as the Hampton review, the Varney recommendations and the underlying Transformational agenda.

Business Matters Stage 1 progressed key aspects of the Single Business Account (SBA). Many of the documents reported by BM1 are still relevant and available from the project web site at

www.wmlga.gov.uk/businessmatters

1.1. Project Objectives

The project aims and objectives of Business Matters Stage 2 are summarised in the [BM2 Project Initiation Document](#)

The following are the agreed objectives:

- To continue the SBA pilots already initiated with CRM suppliers and take them to conclusion. This will allow the efficiency gains and process improvements to be fully calculated and demonstrated.
- To conclusively demonstrate that the current version of the SBA is ready for deployment by other West Midlands authorities with minimal deployment costs.
- To extend the pilots to other West Midlands authorities to prove that the work of the pilots to date is transferable and that efficiency gains and improvements will follow in other local authorities.
- To identify which business to local authority transactional services will lead to greatest efficiencies if transformed using the SBA infrastructure.

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- To extend the pilots into new service areas, eg NDR.
- To develop and deliver process maps based on the pilots that will serve as blueprints for other authorities wishing to undertake process improvement as part of the Transformational Government agenda.
- To disseminate the learning to other authorities using the dissemination funding already available from the Working with Business National Project.

The above relate to the National and Regional Improvement Priorities as follows:

- National: Cross cutting: Transactional
- Service Based: Miscellaneous and Environmental Services
- Regional priorities: Corporate Transactional and Transformational Government including Business Process Re-engineering.

Four work strands were established to meet the above objectives. Deliverables and tasks were defined in an additional document which is available at:

[Link to deliverables doc.](#)

Those deliverables have been copied into this report and progress against each of them is reported in the following sections.

1.2. Key Achievements

The project has been highly successful in many respects:

- It has demonstrated that a practical deployment of the SBA can be made without significant expenditure (eg the Evolutive property database at Redditch BC).
- It has further evidenced that the Business Description Schema developed in Business Matters Stage 1 is an important workable standard to enable information exchange between different agencies.
- It has identified quantifiable efficiency gains that can be made by deploying the SBA without transformational change.
- It has led to a more clearly identified business case for the SBA, especially in the current post Hampton and post Varney landscape where data sharing is increasingly prescribed.

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- It has clarified that many of the transformational objectives that Central Government is setting, such as cross agency working and information sharing cannot be realistically achieved without the implementation of the standards set by the Business Description Schema.
- It has made further progress with work towards agreeing a practical approach to Identity Management for businesses.
- It has helped facilitated better cross agency co-operation by introducing Business Matters to the Business Support Simplification Programme being driven by the new Regional Development Agency and BusinessLink structure.
- It has led to the clear positioning of the SBA as an important enabler for the objectives being set by the Better Regulation Executive, BRE. This is exemplified by the recognition of the Retail Enforcement Pilot (REP) that the SBA is an important enabler for them to move from phase 1 to phase 2 of their own project.
- It has led to an agreed forward-looking agenda with all relevant agencies to better understand how working with businesses will sit within Block 4 of the Local Area Agreement that all authorities and partnerships need to address.

There have been a small number of exceptions that the project has not been able to address due to the limited time and budget available. Some of the pilots were not able to progress to a new systems architecture due to the time constraints. Whilst important Activity Based Costing work was done at Solihull, Redditch and Bridgnorth, it was not realistic to do this at Dudley as well.

The Business Matters Board is pleased that this report is able to highlight significant achievements made within a modest budget and a relatively short timescale. There is still much work to be done and the Board is hoping to build on some of the achievements above in a follow up phase.

2. WORKSTREAM 1: LICHFIELD DC

2.1. Background

This workstream was lead by Rita Wilson at Lichfield District Council, on behalf of the Staffordshire Connects group. It focussed on the following areas:

- Reviewing developments to the Oracle CRM suite at both Staffordshire and Solihull, and reporting on configuration or development required to bring both systems into parallel;
- Reviewing services within Environmental Health at Lichfield and Trading Standards at Staffordshire County, with regard to the transfer of those services into a Single Business Account environment;
- Contributing to the business case for the SBA through process mapping and reengineering, and quantifying the likely savings.

2.2. Deliverables

The following were the agreed deliverables within WS1:

WS1-1	Review upgrades to Solution Architecture	Take feedback from other strands of the project to identify appropriate changes to the Oracle LG45 based SBA implementation. Prepare upgrade report for Staffordshire Connects and other users.
WS1-2	Review of processes covering Lichfield Environmental Health Services and Staffordshire County Trading Standards	Report reviewing business processes and mappings to a proposed SBA implementation including cost benefits identification

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2.3. WS 1-1 Review upgrades to Solution Architecture

Lichfield and all Staffordshire Authorities share a single instance of Oracle LG45. A proof of concept in Business Matters Stage 1 demonstrated that The SBA as defined by BDS3 can be deployed within version 11.5.10 of LG45. This has been confirmed by the work done at Solihull MBC. A comprehensive pilot report and Oracle Consulting report is available from BM1 web site reports. It had been anticipated that the system would be upgraded to 11.5.10 during the period covered by BM2, but that has not yet taken place. However, the Staffordshire LG45 system is effectively patched up to 11.5.10 so could implement the SBA now if they wished with Customer Online as the delivery mechanism. This would enable CRM based interactions to be presented for businesses within CRM. Non-CRM interactions will require migration of the service area into CRM or integration with back office systems.

Confirmation is needed from Oracle that this is the case and that other user Authorities can also implement the SBA as defined by BDS3 in either version 11.5.9 or 11.5.10

Solihull MBC has deployed the SBA in version 11.5.10 of LG45 and has made considerable additional configuration detail available for other Oracle users. Although it was clear that the configuration in BDS3 can be deployed it is dependent on the use of the flexfields identified in the document so deployments at individual Authorities will have the constraint of how they utilised these flexfields in their own configuration.

[Link Needed to SMBC Oracle Architecture document](#)

[ST2KR1 Oracle configuration,](#)

This will be of direct benefit to Walsall MBC and Sandwell MBC as well as other users such as Bolton MBC who have tracked the progress of BM2. This sharing of information is ensuring that costs are minimised and economies of scale enjoyed.

2.4. WS 1-2 Review of processes covering Lichfield Environmental Health Services and Staffordshire County Trading Standards

The work at Lichfield was a continuation of the work started in Business Matters Phase 1 looking into the processes around a business involved in the retail of alcohol. The following processes were selected for further exploration to see whether the implementation of an SBA within those processes would lead to efficiencies:

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- Liquor Licensing Processes (Premises Licence, Club Application Certificate, Temporary Event Notice (TEN) and Personal Licence)
- Food Business Registration
- Environmental Health Scheduled Inspections
- Trading Standards Scheduled Inspections

Within these processes Pubs were the business type that was focused on as they crossed all three areas.

In addition to this the forms used in each of these processes were analysed to see where there were duplications in the collection of information.

A report matching processes to the Local Government Services List and some comments on scope for improving this taxonomy is available:

[Business Matters – Review of classifications.doc](#)

[Pilot Processes and classifications.xls](#)

Approach and Methodology

The methodology used to calculate efficiency savings was rough cut Activity Based Costing (ABC). A number of people on the Business Matters project attended an introductory workshop on Activity Based Costing run by ValueAdding.com at the end of November and a follow up workshop on January 30th.

As Is and To Be Comparison

The findings showed that while there will be some valuable and significant savings from the introduction of the SBA. Whilst the regulatory requirements that surround the Licensing and Environmental Health processes mean that there are many areas that would not be able to change, savings of around 10 weeks effort can be made within the existing framework . The expected savings in time per process are shown in the diagrammes in the report attached.

[Link to BM2 ABC report S Quinn.doc](#)

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A sample of the detail to illustrate the point is copied here:

Process	As Is Time (Minutes)	As Is Cost	To Be Time (Minutes)	To Be Cost	Estimated Time Savings (Minutes)	Estimated Cost Savings
Food Business Registration	241	£83.99	192	£66.91	49	£17.08
Environmental Health Food Inspections	251	£87.47	190	£66.22	61	£21.26
Temporary Event Notice	55	£16.63	40	£12.09	15	£4.54
Personal Licence	48	£14.51	46	£13.91	2	£0.60
Premise Licence and Club Premises Certificate	109	£32.95	98	£29.63	11	£3.33

The figures show that savings can be made in all areas through introducing the SBA without significant re-organisation. Around 10 weeks staff time saving has been calculated, a significant saving for a District Council. If this level of saving was applied to a wide range of services, then the savings are even more significant. The savings are spread across a number of staff in different departments so the real benefit of introducing the SBA would be realised with some changes to working practices

This illustrates one of the main conclusions of this stage of the project: The business case for the SBA should be made by understanding the need for better ways of working that involve a degree of change in the way services are delivered. On the one hand recommendations from Varney and Hampton in particular propose a greater level of change than was assumed during BM1. On the other, it is not possible to implement these changes without the SBA being in place.

The Business Case is therefore made by Varney, Hampton and to an extent Gershon: better ways of working, including shared services, joined up service delivery, improved planning as necessitated by Local Area Agreements: all identify efficiency gains.

Early attempts to pilot new ways of working – eg the Retail Enforcement Pilot – have concluded that Identity Management, and data sharing standards are impediments to achieving these savings. The SBA facilitates change. The savings come from better ways of working which the SBA makes possible, not from implementing the SBA without change.

The review of the processes at Lichfield has demonstrated that the SBA will facilitate closer working between Lichfield DC Environmental Health and Staffordshire County Trading

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Standards. The process of planned inspections being pioneered by the Retail Enforcement Pilot and other related changes required by implementing the Hampton review require this change and necessitate the SBA being in place.

(See the following section 3.6 for additional efficiencies gained at Solihull MBC).

Forms Review

A review was carried out of the forms currently used within Licensing and Environmental Health at Lichfield District Council and Trading Standards at Staffordshire County Council to identify where there is an overlap in the gathering of information from businesses, with Pubs being the primary focus. The exercise was also used to identify where there were differences in categorisation of businesses between the departments and where there might be the possibility in the future for Environmental Health and Trading Standards to help each other in the 'information gathering' side of things. Forms that were reviewed were:

- Trading Standards Licensed Premises Questionnaire
- Trading Standards Record of Visit
- Environmental Health Food Business Registration (Form from Food Standards Agency)
- Environmental Health Food Premises Inspection Record
- Environmental Health Food Premises General Information File Record
- Environmental Health Inspection Form
- Environmental Services Health and Safety Executive Form (Statutory)

The study demonstrates the extent to which business processes and information management standards vary across service areas. Information is gathered from businesses in some cases where it is held already. The two forms that had the most cross over were in common fields were Trading Standards **Licensed Premise Questionnaire** and Environmental Services **Food Premises General Information File Record** where 9 of the form fields were the same. This represents considerable duplication of data gathering from the same business by different teams.

The introduction of the SBA will help standardise information management and also introduce a mechanism whereby a business can give information once and that the information can be shared across service areas and across both tiers of government in two tier areas.

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The outcome of the review can be found in the [BM2 Review of Forms at Lichfield.doc](#)

3. WORKSTREAM 2

3.1. Background

This strand was lead by Kevin Smitten at Solihull MBC. It focussed on the following areas:

- building on the Business Description Schema implementation work in the Oracle environment previously completed at Lichfield DC
- reviewing issues and options around Business Identity Management, with particular reference to the approach offered by the Oracle environment and being taken at Solihull
- further developing previous work around identification of business facing services, and their relative importance in terms of transaction volumes and impact
- working towards a business case for the SBA particularly where driven by efficiency savings.

3.2. Deliverables

The following were the agreed deliverables within WS2:

ID	Deliverable	Description
WS2-1	Design Solutions Architecture for Solihull following Oracle Guidelines from Business Matters Stage 1 and extending to full deployment.	Review Oracle Consulting recommendations to build a Business Description Schema V3 compliant SBA in Solihull MBC Oracle CRM system. Extend to become a full service deployment architecture.
WS2-2	Highlight Business Identity Management issues and options	Review the proposed information architecture and related business identity management issues and implications.
WS2-3	Identify and review business facing customer services	Build on Solihull work in hand to identify and review business processes and review relationships between the LA and the business

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ID	Deliverable	Description
WS2-4	Calculate efficiency gains following from SBA based service improvement, feed to business case.	Build on Solihull MBC work to date to calculate cost savings that could follow from service transformation

3.3. WS2.1 – The Single Business Account within an Oracle environment.

In the course of the Business Matters Phase 1 project, an SBA environment was established within the shared Staffordshire Hub Oracle environment (see previous documentation for details of this). However, this was limited by time and budget to the delivery of data capture, working and storage which supported the needs of the Business Description Schema v3, and was not extended into a full service deployment architecture.

In this workstream, Solihull MBC have built on the work completed at Staffordshire to establish the SBA within their own Oracle environment, and further extend it into a full deployment to include identity management, a web front end to be accessible by business customers, and integration of the relevant systems supporting selected service areas. This work will benefit all Oracle LG45 users. This includes Walsall MBC and Sandwell MBC in the West Midlands. Bolton and others have stayed close to the project to avoid cost duplication.

Solihull's integration strategy is focused on the use of web services wherever possible, to support data exchange between a central data hub and those back office systems used for processing and workflow in the context of a specific service.

The Oracle developments are part of a much larger and wide reaching modernisation programme at the Authority, which includes process change and organisational restructuring. This means that in programme planning terms, the technical changes and implementation are carried out in parallel with process and organisation change. The key elements of the process, focusing on the system changes (as against a strategic view), can be summarised as:

1. Infrastructure: determining and delivering the initial infrastructure required to support modernisation, including the Single Business Account, within the Oracle environment.

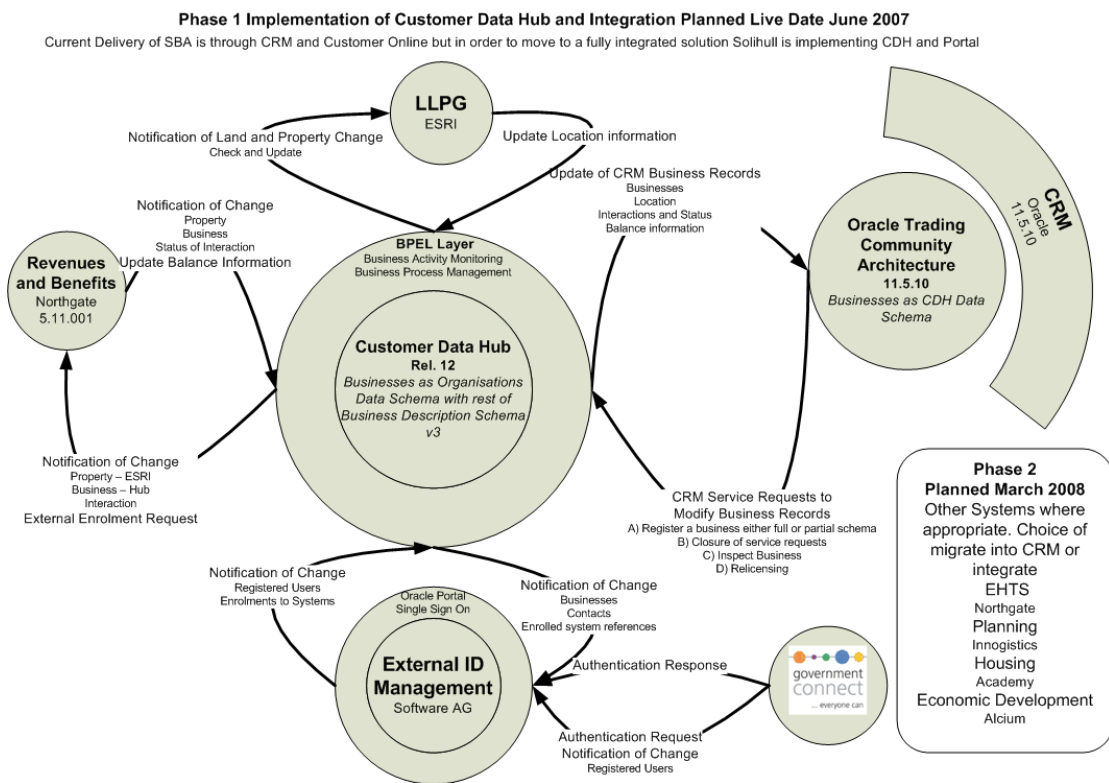
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2. Change: the wider Change phase: includes prioritisation of services to be modernised (see WS 2-3 below), process reviews and reengineering. This element is likely to be accompanied by standard non-technical Change issues such as process and culture change, with possible requirements for redeployment or even redundancy of staff.

3. Implementation: the modernised process is implemented into the CRM together with supporting integration to back office systems. Process specific scripting of processes is not required, as Solihull use separate Knowledge Base software to prompt customer service agents with the appropriate data to enter into the Oracle screens.

Detailed outputs from this work strand can be found in the linked report [ST2KR1Oracle configuration](#), including the full deployment architecture and single sign on approach, data population method and notes on Oracle versioning.

The following schema gives an indication of the content of this report:



This architecture was built on to an initial implementation of the Business Description Schema within the CRM itself and subsequently moved to the Customer Data Hub.

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Because of historical changes and variations in the versions of Oracle being used across the country, a comparison analysis has been completed which should allow any local authority using Oracle to map out what changes they would require in order to achieve the same implementation delivered at Solihull.

3.4. WS 2.2 – Identity Management

A consideration of many of the identity management issues that need to be addressed when deploying the SBA were reported in Business Matters Stage 1 and are still valid: See [SBA Authentication - Guide to Authentication v1.0](#)

An analysis was completed by SMBC in 2003 of the main issues they perceived with identity management, in the context of bringing data together into a single “account” structure and possibly exposing this for self-service through the Internet in due course.

Those issues were:

- A consistent approach is required to all access channels
- Registration, Enrolment and Authentication processes are needed
- Data Management requirements are very complex, for
 - Users
 - Customers/Rights
 - Links to other systems
- Single Sign On must be achieved across a mixed economy of systems
- Oracle was the strategic enterprise wide application, but did not provide an approach to managing the Gateway or ID management in general.

In the interim period to today, considerable progress has been made in both implementation of a solution and understanding of the risks and issues.

The chosen solution was, initially, to make use of the Government Connect product in this area - the Government Gateway, which became GC Register. The handling of identity and access rights management within Solihull is handled by a solution from Software AG tightly integrated with Oracle Portal and Single Sign On together with LG45.

However, a number of issues were identified in the early days of evaluating and implementing the solution. These were:

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- No single sign on functionality – use of GC register would result in a single registration process for a user, followed by multiple enrolments to access services. Each enrolment generated a separate User ID, which a user would require in order to gain access to each service.
- The users IDs were long, complex and unwieldy, leading to concerns over take up and usage
- There was no ability to manage lost or forgotten IDs. These would simply persist in the system, whilst an additional ID was issued to the user as a replacement.
- Cost – charges for access to the Gateway, and ongoing service costs, were high SMBC has identified around £1m of required investment, comprising £300k for the GC provided elements, and £400k of “supporting” infrastructure.
- Lack of maturity of the solution, which was not widely in use among local authorities.

It should be noted that some of these issues have been mitigated, to a greater or lesser extent, by recent “upgrades” to the GC offering. Those which remain as clear challenges are identified in the attached report.

In order to manage the issues above, SMBC built a solution based around the GC register service but considerably extending it. The chief requirement was to achieve true Single Sign On (SSO) for users, both internal and external customers, across all SHMBC systems and potentially extensible into a pan- Public Sector environment. For example, connections to the Shibboleth system for education-related transactions needed to be allowed for.

Detailed outputs around this deliverable can be found in the report linked below, including SMBC’s proposed authentication architecture; further detail regarding issues and possible resolutions, and commentary on efficiency savings delivered by implementing effective ID management and Single Sign on.

[ST2KR2 authentication ID mgt.doc](#)

3.5. WS 2-3: Business-facing processes

At an early stage of the modernisation project, a study was completed of the customer interactions in each service area, by channel and transaction type. This data provided strong evidence for the prioritisation of services to be addressed by the modernisation programme.

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The patterns revealed for SMBC could be expected to be very similar for authorities of a comparable profile (ie Metropolitan Boroughs) and provide at least an outline guide for other authorities.

Full details of the outputs from this deliverable are available in the linked report below, including: Analysis of business facing services, their key activity elements and volumes (a total of 85,450 business facing transactions per annum); order of implementation into the Solihull SBA environment; statistics around actual demand within the live environment.

[ST2KR3 business service transactions.doc](#)

3.6. WS 2-4: Efficiency gains and the SBA business case.

SMBC have embarked upon an extremely wide ranging, high value change programme to deliver efficiency savings and service improvements. The implementation of a Single Business Account will be one of the deliverables of this programme.

Efficiency gains are predicted to derive from a combination of modernisation activities, including the centralisation of activities into a front office contact centre, improved procurement, process re-engineering and de-duplication of activities. Of these activities, only the de-duplication of activities is directly dependent on the implementation of the SBA environment (ie, being able to see all the relevant information about a business in a single location). However, the effectiveness of centralising into a contact centre is likely to be increased by the parallel centralising of information (and the accompanying reduction in requirement for training contact centre staff on multiple systems, etc). The process mapping and re-engineering phase is also a prerequisite for being able to identify areas of duplication which can then be removed once the SBA environment is available.

1. Centralisation into a contact centre.

The model being used to calculate efficiency gains from this element is as follows:

Generic processes have been identified and the core applications configured to deliver them. Customer service requests, procure to pay, recruit to pay, income etc. The Business Improvement Projects assess the business against these processes.

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All customer facing areas are surveyed to identify customer service requests and the associated tasks and the information required to initiate them, and then the FTE resources associated with the activities to complete these tasks (contact plus associated administration and processing) are estimated (activity based costing).

The tasks are then grouped into the “To Be” processes and are profiled (eg, regulatory, providing information, etc) and the number of FTE resources working on each task profile is calculated.

An industry standard factor derived from previous experience of contact centre implementation is then applied, to predict the likely efficiency savings. Initial savings of 20% have been achieved in the customer facing processes with year on year efficiencies predicted at around 4-5% in the Solihull programme. The widening of the approach to end to end reviews to include back office processing is predicted to generate a further 20% efficiency and this is borne out by the first of these wider ranging reviews in Revenues and Benefits and now Trading Standards.

The full methodology, including initial and “to be” budget review, can be found here

[WS2 KR5 – Budget and Financial Efficiency Capture Process and Procedures.doc](#)

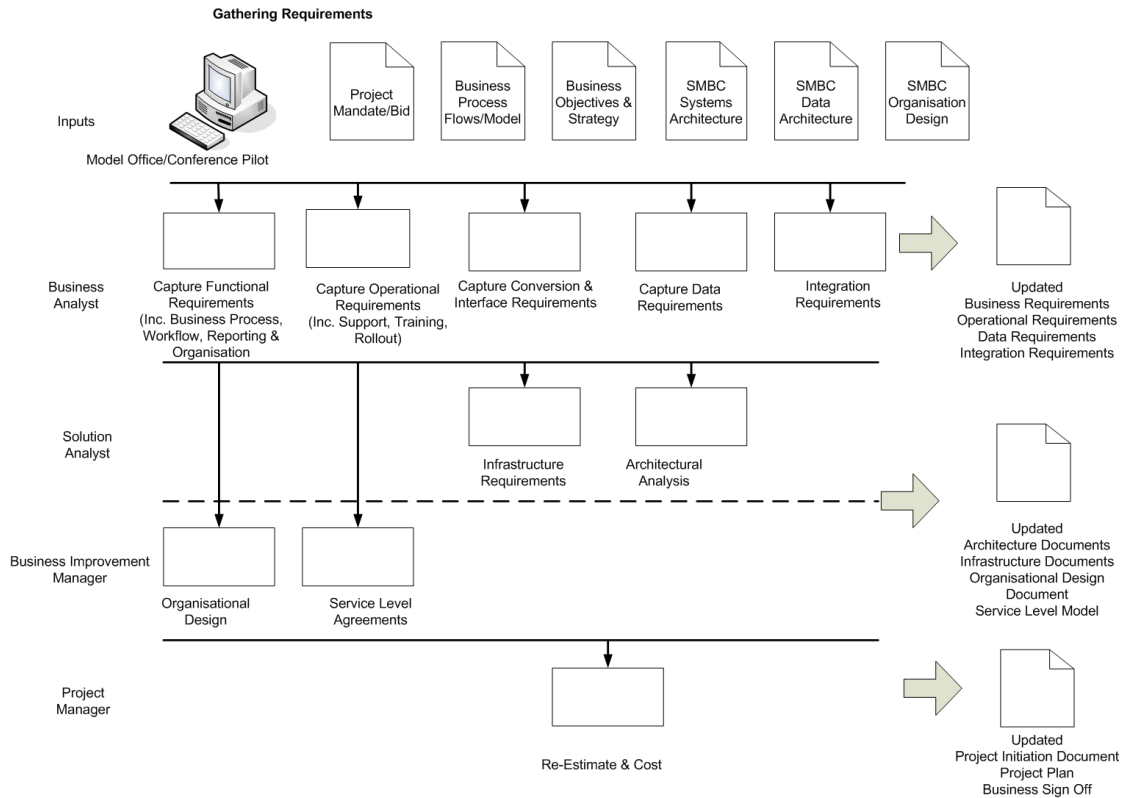
2. Procurement.

Savings in this area will come from a combination of driving down contract costs, and reduced headcount associated with procurement activities due to centralisation. A substantial proportion of the estimated savings will come from this area, particularly in the early years of the programme. The target savings are 7% of controllable spend over a five year cycle and actual banked savings are on target to deliver this.

Process Reengineering approach

The process for re-engineering service delivery, which provides the business case for the programme, is summarised in the graphic below. Each element will be completed in “sample” form, ie, accurate figures are calculated for a sample process(s) and the likely savings for the whole are extrapolated.

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As discussed above, certain elements of the overall efficiency savings can be attributed directly to the availability of the SBA environment. In more detail, they are:

- Procurement savings based on rationalisation of contracts. Currently, a supplier to the council may have multiple contracts with different departments, potentially for the supply of the same goods but at different prices. The potential for savings when such contract anomalies are exposed and removed is clear, and has been demonstrated in practise by the OGC's Zanzibar project.
- the potential to re-engineer processes – those processes common to multiple tasks can be reduced or eliminated
- a reduction in duplicated activities (eg concurrent, or near concurrent, site visits by different council personnel)
- a reduction in data capture and maintenance overheads.

4. WORKSTREAM 3 : REDDITCH BC

4.1. Background

- This workstream was lead by Rachel Egan at Redditch Borough Council. It focussed on the following areas:
- Establishing the Business Description Schema within Alcium's Evolutive property search system, to provide the basis of a Single Business Account
- Examining barriers to take up, through consultation with local businesses;
- Reviewing efficiency gains made from process changes around Property Search
- Reviewing options for accessing or establishing a master index of businesses.
- Consider alternative approaches to security

4.2. Deliverables

The following were the agreed deliverables within WS3:

WS3-1	Establish a working example of the SBA in a live environment	Work with Alcium to establish the SBA in their Evolutive property search system and migrate from test to live. Report on lessons learned.
WS3-2	Address Barriers to take up	Work with approximately 20 selected businesses to understand barriers to take up and address them.
WS3-3	Review processes and measure potential for efficiency gains	Review definition and categorisation of services offered, Identify potential efficiencies by working in an SBA environment.
WS3-4	Review data management issues	Review and report on options for improving quality and quantity of data availability.
WS3-5	Identify an interim approach to registration and authentication	Work with Alcium and in House resources to agree a practical approach to managing

enrolment, verification and authentication.
Compare with Government Connect plans.

4.3. WS 3-1 Establish a working example of the SBA in a live environment

The Redditch Economic Development team worked with Alcium to establish the SBA in their Evolutive system and have migrated from test to live. Evolutive now conforms to version 3 of the Business Description Schema (BDS3). All existing records within Evolutive now contain the BDS fields which can be completed in order to develop SBA records for existing clients. This means that all other Evolutive users in the UK will benefit from this work and that costs duplication has been avoided.

Within the online system business clients can carry out end to end self service when searching for vacant commercial premises, raise other service requests within the system and view their transaction history. All activity carried out online by the business client is instantly transferred into Evolutive which in turn stores the information to be displayed to the client online.

A large number of scenarios were trialled during the testing period to ensure the optimum experience for both the client and the back office operator. A model has successfully been built that can serve as the design to increase the number of services offered to the Redditch Business Community. It can also serve as the blueprint to roll out a solution to the Worcestershire Hub with little further investment needed.

The system is public facing and can be visited by clicking on the following URL:

<http://propertysearch2.evolutive.co.uk/web%20integrations/redditch/pages/home.aspx>

4.4. WS 3-2 Address Barriers to take up

Due to delays in development and an extended testing period the Redditch team was unable to work with businesses to populate the system with real data or to discuss barriers to take up. They would hope to continue to review this in a follow up phase.

4.5. WS 3-3 Review processes and measure potential for efficiency gains

The reengineered processes were not dependant on going live with the SBA and staff were therefore still able to measure and report on some of the potential benefits of increased self service and other efficiencies to be gained by better use of the system. Rough Cut ABC was used to measure potential efficiencies. The metrics and calculations are reported in the consolidated ABC report accessible through the following link:

[Link to BM2 ABC report S Quinn.doc](#)

The results confirm that some efficiencies can be made. However, with a small team in place there is always the question: if the saving is less than a full time equivalent member of staff, how can the savings be realised? The ABC workshop on 30th January debated this and concluded that the main advantage of introducing the SBA is that it facilitates a review of different ways of working. Redditch and the Worcestershire Hub now have an infrastructure in place that will support several different ways of delivering the service as well as increasing the range of services offered. Efficiencies will follow from introducing new arrangements. **Further work could review the recommendations in the Varney report and consider how the SBA would help address them.**

The team currently focuses on property search. The Evolutive system has been modified so that a range of other business support services can be offered by the existing team or the team working with other service areas and sharing information.

4.6. WS3-4 Review data management issues

Business Matters stage 1 developed the Business Description Schema version 3 (BDS3) which was released following consultation in March 2006. It recommended an approach to uniquely identify businesses and also to data sharing.

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In April 2006 Business Matters was invited to discussions with HMRC to explore work done to date by both parties. It became apparent that there was considerable overlap between the two programmes:

- HMRC and BM had both developed the concept of the Single Business Account. HMRC was formed by the merging of Inland Revenue and Customs and Excise. The merging of numerous data bases continues to be a significant challenge for them.
- HMRC and BM had both independently concluded that the introduction of a new Unique ID for businesses was not a practical short or medium term solution. Instead the use of existing IDs should be used in combination with other data elements that leads to a unique deployment and a 'virtual' SBA.
- In particular both teams concluded that key field would be the use of Companies House Number to identify registered companies; Charities House number for Registered Charities and the use of the National Insurance Number for sole traders and unregistered businesses.
- HMRC had started to develop a 'shadow business index' for their own internal use whilst BM had begun to explore the need for a regional index of businesses for West Midlands local authorities' use.

BM introduced the concept of premises to HMRC based on the definition of the Business Premises Account as set out in BDS3. HMRC in turn shared work done to identify different types of partnerships.

With support from the Cabinet Office (who were at that time still finalising the establishment of the Better Regulations Executive, BRE) HMRC established a working group, initially referred to as a 'data sharing consortium' following a meeting of invited parties chaired by Sir David Varney in June 2006. The consortium was announced as comprising HMRC; BRE; Companies House; Defra; ONS; HM Treasury, Business Matters and Government Connect.

Four workshops were held during the summer of 2006. BM was represented at all of them. Each workshop involved information sharing and feedback on tasks assigned to each member in the interim. BM shared BDS 3 and the concept of the Business Premises Account with all parties. Only HMRC and BM could show evidence of significant documented work prior to the workshops.

The notion of a layered approach to building a national index of businesses was developed. The higher layers embrace the key elements of BDS3. The model remains the blueprint for further work towards a national ID management and national index of businesses. The work

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of this group was referred to in the Varney Report and the Chancellor's pre-budget speech in November.

The work of the HMRC led consortium has been continued more recently under the management of BRE. On December 8th Karen Hill of BRE chaired the most recent workshop in the series. She also met with Rita Wilson, Business Matters SRO, to explore further joint working with BRE/BM.

The synergy between the BM and BRE agendas led BRE to meet with BM, AWM and others at WMLGA in Birmingham on January 18th 2007. The outcome of the meeting was a confirmation from BRE that they see the BM project as essential to keep the Local Authority perspective represented in their continuing work. Karen Hill also confirmed that the emerging model in the West Midlands with Local Authorities, AWM/Business Link and other working together led her to conclude that the LBRO, the Local Better Regulation Office, should possibly be located in the Midlands.

Work is continuing. As Business Matters Stage 2 concludes discussions are continuing with both AWM/BusinessLink and with BRE to build further on the work done to date.

Further background is available from the following documents:

[ST2KR2 authentication ID mgt.doc](#)

[Business Matters AWM joint working doc](#)

There are many significant issues to do with data management including identifying the best source of data and quality of data that were reported in Business Matters Stage 1. The following document summarises some important analysis done by London Connects and shared with BM1:

[London Connects - Work on the Single Business Account](#)

4.7. WS3-5 Identify an interim approach to registration and authentication

A consideration of the issues was reported in Business Matters Stage 1 and is still valid: See [SBA Authentication - Guide to Authentication v1.0](#)

Meetings with Alcium reviewed several alternative ways of addressing security within the new system. These meetings help clarify that there is still a need to better identify the levels of security that should apply at different points in the system to reflect the real needs of the user,

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ie the business representative. Businesses are complex organisations. Different contacts may have different views. Security needs to be defined at the level of the contact, not the organisation.

A working model has been designed and built which is considered to be very secure – possibly more secure than the business need would identify. It is significant in that it is the first model to be designed specifically to work in an SBA context:

- All contacts within an SBA record can be viewed by all other contacts. Clients are made aware of this before they register.
- All contacts can amend other contact details with the exception of the email address as this could lead to passwords, etc., being emailed to unauthorised persons.
- Contacts can only view their own transactions and those transactions that other contacts have chosen to share with them. Contacts can choose to share details of their transactions with any other existing contacts. To do this they tick a box against the contact's name. There is no 'share with all' option as this would include any contacts that registered after this option was chosen.
- Within Evolutive, each record or part of a record (e.g. note) is attached to one or more contact within the business which enables back office operators to control what can be viewed by whom online.

There is no requirement to prove that a contact is part of a company as they will only be able to view the company contact details, the names of any other contacts registered at the company and details of any transactions that have been positively shared with them. A potential problem with this is if somebody registers as the MD and another contact chooses to share a transaction with them finding later that this was someone pretending to be the MD. As login details are emailed to the contact, other contacts could verify the legitimacy of a contact by checking that they have used a company email address. A system could be set up whereby if a company email address isn't used (which isn't unusual) council staff could contact the registered contact via the company switchboard to verify that they are an employee of the company and that the contact name given is the name of the person that registered.

Further work is needed to build on this new design, test it with business users and modify it as needed.

[Link to the Alcium specification document](#)

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5. WORKSTREAM 4

5.1. Background

This workstream was lead by Chris Tompkins at Dudley Metropolitan Borough Council, and included work on:

- Analysis of requirements for compliance with the Business Description Schema V3 at Dudley
- Take up levels and barriers, consulting with local businesses
- Identification of relative benefits of making specific services available to businesses via the SBA;
- Consideration of multi agency working around the SBA.
- Reviewing options for accessing or establishing a master business index.

5.2. Deliverables

The following were the agreed deliverables within WS4:

WS4-1	Review of Dudley MBC interim SBA database solution	Review the database currently being used to store data about businesses. Compare and contrast with CRM centric approach. Share lessons learned.
WS4-2	Review of take up of SBA by businesses	Report measuring the take up of SBA by selected businesses, and lessons learned in encouraging wider take up.
WS4-3	Measure relevance and benefits of making selected services available to businesses via the SBA	Identify services to businesses and associated transactions that are being managed by Dudley Plus one stop shop, measure benefits.
WS4-4	Liaise with other agencies to jointly review benefits of the SBA	Work with the Dudley Business Group, the Business Link organisations, Chambers of Commerce and others to review the potential impact of joint working around the

5.3. WS4-1 Review of Dudley MBC interim SBA database solution

Meetings with ICT and Business Development at Dudley confirmed that the in-house built interim solution did not fully conform to BDS3. It was agreed that modifications to the system should be made to make it compliant.

A review of the extent to which the database had been used and populated concluded that an enhanced system should be built around a new index of local businesses. However, given that the work that Dudley MBC has recently been doing with the newly formed Business Link West Midlands Gateway Service it was concluded that a more appropriate response was to design a new solution that is both BDS3 compliant and also integrates with the new regional database of businesses being built by Business Link West Midlands.

A decision was taken to postpone future ICT development around the interim SBA solution and to focus instead during the remainder of the project period on liaising with the business community and with other relevant agencies.

The decision to co-operate with the regional database has been positively received by Business Link West Midlands. The feasibility review and design stage should commence in April with the expectation that a working model will be in place by September 2007. This should serve as a proof of concept and pilot of a new way of working that will inform all West Midlands local authorities of the potential large cost savings that can be made by avoiding the need to construct a database locally. Cost savings can also be made on an indefinite basis by cooperating regionally with ongoing data cleansing and database upgrades.

The interim report would advise all Local Authorities to:

- Conform to the BDS3 Standard
- Liaise with the Regional service and specifically the regional database
- Data sharing and data management are more significant issues to address than CRM or alternative architectures

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5.4. WS 4-2 Review of take up of SBA by businesses

Dudley decided to focus on the Black Country FTSE top 150 companies. Approaches have been made to almost all of those who are located in Dudley. With only one exception they have agreed to cooperate in the SBA project.

Chris Tompkins became chair of the Black Country FTSE top 150 companies during the course of the project. This will ensure that the good working relationship that has been created during Business Matters stage two will continue into the indefinite future.

Lessons learned during this process are:

- Large businesses as well as SMEs appreciate the potential of cooperating with an SBA programme if the benefits are outlined to them.
- Personal contact is beneficial. Whilst this is time-consuming it will probably ensure greater take-up in the longer term.
- Working through established other organisations such as the Black Country Business Development Group and the Black Country Chamber of commerce is beneficial.
- Working with the newly formed regional RDA structure is to be recommended.
- Business support to the region is being significantly reorganised, so multi agency co-operation is essential. Business representatives now expect this and are ready for the SBA to underpin it.

5.5. WS4-3 Measure relevance and benefits of making selected services available to businesses via the SBA

Dudley had originally decided to make services available to businesses through the SBA system in line with services going live through Dudley Plus contact centre. This decision, whilst fitting with the Dudley MBC corporate plan led to the inevitable conclusion that services would be made available to businesses in a sequence and priority that has been determined by go live of services to citizens.

The Dudley plus contact centre has been referenced in the Varney report as a good example of better service delivery. A study commenced during the process of Business Matters Stage 2 with the Cabinet office working closely with Dudley to measure the effectiveness of alternative channels. This has taken higher priority than measuring the effectiveness of specific service delivery to businesses.

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Technical challenges impacted on the take up by the FTSE top 150 businesses. In particular the postcode look up software failed to perform at certain times. This prevented a systematic measure of transactions by business type.

Lessons learned through this phase of the project are:

- The SBA deployment needs to fit with the wider corporate agenda.
- Other corporate priorities such as delivering Citizen services through CRM may take higher priority and compromise SBA project timescales.
- At this stage businesses are willing to cooperate with the service delivery across all service areas. There is no early indication that they will be selective.

5.6. WS 4-4 Liaise with other agencies to jointly review benefits of the SBA

The economic development team at Dudley MBC has been particularly successful in promoting closer working between Business Matters and other regional agencies.

Of particular importance is the new regional structure that applies throughout the UK for the rationalisation, simplification and delivery of business support. Other regions may wish to learn from developments in the West Midlands facilitated by business Matters Stage 2:

The regional Development Agency, Advantage West Midlands has met with Business Matters on several occasions. They have made considerable progress towards rationalising and simplifying business support offerings as part of the DTI sponsored Business Support Simplification Programme (BSSP). They have recognised that there is a need for closer co-operation with local authorities and further work is needed to review and rationalise offerings from the 38 West Midlands councils.

AWM has agreed funding to define how a programme of joint working would benefit West Midlands Local Authorities and AWM/Business Link. This is summarised at:

[Link to briefing paper for BM3 AWM joint working](#)

The first point of contact for all businesses in the future should be the regional Business Link organisation. This aspiration is clearly stated in the Transformational Government agenda and echoed in the Varney recommendations. All local authorities will be encouraged to cooperate with this new way of working.

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The first port of call for a business person will be to the BusinessLink managed Gateway service. This will entail capturing their details in the regional CRM system. An early meeting with Business Matters and the Gateway service facilitated a review of the Business Description Schema and its central importance to regional joint service delivery and information sharing. The CRM system being used by the Gateway has now been modified to reflect BDS3. This development is particularly significant as it gives an opportunity for BusinessLink and local authorities to share information conforming to BDS3 in a unified way with far less cost involved than would otherwise be the case.

It also means that Dudley and other council can start to plan to use the regional service and regional database in a more innovative way. For example, Dudley now has the opportunity to:

- Use the regional database instead of constructing and populating a local database of businesses. This represents a significant cost saving in its own right.
- Plan to cooperate with Business Link West Midlands so that the business sector requests for support that are made to the gateway are communicated automatically via the SBA to Dudley.
- A two way information sharing and data updates way of working can be introduced. This has great potential for ongoing efficiencies and cost savings.
- Dudley has the platform in place to review truly different ways of working and introduce efficiencies based on multi agency co-operation. An infrastructure has been designed that will facilitate many of the recommendations as set out in both the Varney review and the Hampton review.

As Business Matters Stage 2 concludes, it is clear that Dudley has introduced the project to organisations and agencies that are positioned to make considerable changes to the way that Government works with Businesses. By introducing standards at this stage, the platform has been put in place that will allow better and more cost-effective ways of working at far lower cost than would otherwise be the case. The West Midlands is particularly well placed to address Varney and Hampton as a consequence. It is probably the only region that has this level of standardisation and co-operation. It is probable that future work will confirm that a model is being built that other regions should seek to emulate.

A proposal has also been discussed with BRE that Business Matters should help introduce the SBA into the Retail Enforcement Pilot. Work to specify how a system should be built that meets REP needs and conforms to the BDS3 standard should commence in early April.

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6. WORKSTREAM 5

6.1. Background

This workstream was led by Sarah Caulkin, Head of Customer Services at Bridgnorth District Council. It focused on:

The deployment of an SBA in the Tagish CRM environment;

Take up by businesses, transaction volumes and management reporting

Contributing to the SBA business case

6.2. Deliverables

The following were the agreed deliverables within WS5:

WS5 -1	Work with Tagish to review and refine the SBA implementation.	Review the current deployment and compare it with version 3 of the Business Description Schema. Recommend changes to the Tagish deployment or to the BDS as appropriate.
WS5 -2	Monitor take up of the SBA by businesses and the transactions involved.	Measure the take up by businesses, and the services and transactions actually impacted at Bridgnorth
WS5 -3	Quantify the Benefits of take up	Using the data from WS5-2 calculate the probable efficiency gains following from the most highly used transactional services
WS5 -4	Identify the most effective and efficient way to build a county wide index of businesses and business register	Highlight the business need for a county wide business index and business register and report on the options available to build them. Liaise with other agencies to ensure that a multi-agency view is considered.

6.3. WS5-1 Work with Tagish to review and refine the SBA implementation.

Evaluation proved that the Business Description Schema version 3 (BDS3) is in synergy with the Bridgnorth deployment and has been used in the live pilot from 1st June 2006 to 28th February 2007. The SBA is an integrated element of Bridgnorth's CRM and e-Forms package NonStopGov (NSG) from Tagish Ltd.

The schema registers businesses in the Citizen and Business Portal, which is used across many different access channels, e.g. by Contact Centre staff resolving telephone business enquiries, for business customers self serving over the web, email, letters and face-to-face visitors.

Registration is via secure server and can be seen at:

<https://www2.bridgnorth-dc.gov.uk/public/servlet/ep.register?auth=10003&context=cus&new=Y&cus=Y&st=INTER>

6.4. WS5-2 Monitor take up of the SBA by businesses and the transactions involved.

The eight month pilot monitored take-up and usage of the SBA. A decision was taken not to market this facility to the business community at this stage in order to prove the concept.

In the eight month trial 128 businesses registered their details resulting in 455 enquiries, the majority of which related to booking land charge searches over the web and business rate telephone payments.

The success of the land charges facility through the SBA was largely due to the support and commitment in the business. The Land Charges Manager was keen to drive online bookings as a way of increasing efficiency in the Legal Services section.

SBA enquiries via the web represented just over 27% of all self serve enquiries into Customer Services, from businesses using the Citizen and Business Portal. This has presented a significant opportunity for the Council to realise its strategic aim of migrating customers to cheaper channels within:

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- A service area that was willing to embrace change; and
- With customers that demonstrated a preference for using the web for these types of enquiries.

Lessons Learned

- There were 30 businesses registered as 'Other Organisation' therefore further information may be required to help customers choose the most suitable option.
- At Bridgnorth District Council the SBA was delivered as part of an integrated strategy within the Customer First team. This proved a very successful approach by delivering more information to businesses at first contact, the benefits of which are discussed further at WS5-3.

[Link here to stats of take up](#)

6.5. WS5-3 Quantify the Benefits of take up

Following on from WS5-2 further analysis was undertaken to quantify the benefits by:

- Documenting the previous and current process; and
- Undertaking rough-cut activity based costing to quantify any efficiency savings.

This analysis used the 2 high volume areas of:

- Land Charges appointments; and
- Business Rate telephone payments.

[Link here to](#)

[Telephone payments using SBA-Bridgnorth.doc](#)

[Land charges using SBA - Bridgnorth.doc](#)

Conclusions from the Land Charges process

- Complete channel migration to the web produced cashable savings and process improvement. The process was reduced from 14 minutes to 5 minutes with savings of around £1.68 per appointment. For Bridgnorth this equates to just over £806 per year based on 480 appointments.

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- There was an additional benefit of removing calls and interruptions in the legal section. This was cited as a significant advantage by the Legal Manager, where the team needed quiet periods to read lengthy legal agreements and contracts.
- Migrating to the web channel actually increased the number of appointments per month by 17.65%.
- An additional benefit resulted from the Council receiving the Land Charges fee up front.
- Automating the payment element of the process meant some of the Non Value Added activities could be eliminated, e.g. payment at the cash office and its associated delays.
- Although the figures show savings in staff time it must be recognised that there is still a cost to the Council with regards to the NonStopGov (NSG) and e-payments technology.
- The Single Business Account (SBA) provided a mechanism for customers to self serve, while allowing the Land Charges section to track appointments.

Next Steps

- The Council is currently digitising all paper based documents around Planning and Land Charges, so that in future searches can be undertaken 'at the touch of a button'. Therefore automating the wider processes even further and creating more savings.
- When digitising is complete the Land Charges posts (1 FT and 1 PT) will be re-deployed into Customer Services.
- It is proposed that Land Charges analyse business usage data from the SBA to see if there are ways the service can be enhanced or developed.

Conclusions from the Business Rate Telephone Payment Process

- The longer term objective is the migration of business customers to self service using the SBA on the web, but for the purposes of the pilot it was used by the Contact Centre in the first instance. It is anticipated the savings will increase as more processes become self service, such as e-payments.
- The SBA provided the Customer Services Representatives with quick access to business account details and the overall call took around 4 minutes. Previously it was estimated calls took around 9 minutes and meant business customers had to repeat their enquiry to two people. This also represents a saving to the customer.

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- Changing the process meant that some of the Non Value Added activities - such as customer callback - could be eliminated, as the whole process could be handled at first contact.

Next Steps

- Now the proof of concept has been demonstrated, the Council will be promoting the SBA to businesses, especially the self service elements. Performance across access channels will be monitored and further rough-cut ABC measured over the next twelve months.
- More processes will be added to the SBA based on volume and feedback from business customers.

6.6. WS5-4 Identify the most effective and efficient way to build a county wide index of businesses and business register

Bridgnorth Supported Redditch in reviewing the work reported in section 4 of this document.

The following paper as also drafted to contribute to the debate on how a regional model for information sharing should be built:

[Multi agency IA.doc](#)

A diagram of the information architecture

The diagram below attempts to represent one implementation of the model using two external agencies (101 and West Midlands Business Link) as one has mandated feedback on the outcome of the case (101) whereas the other has not. This model could be repeated for any number of agencies (such as the County Council and Citizens Advice Bureau).

It is anticipated that the ideas reviewed in this document will be carried forward and built on by further projects in the Business Matters Programme.

7. WORKSTREAM 6 COMMUNICATIONS AND DISSEMINATION

7.1. Deliverables

The following were the agreed deliverables within WS6:

WS6-1	Ensure wide consultation and dissemination of project to LAs (at correct officer levels)	This is a regional project and as such, all authorities, and relevant departments, are to be kept informed and consulted on its objectives
WS 6-2	Disseminate cross pilot reports on potential efficiencies; business case for SBA and the perceived need for a regional or sub regional business index.	Work with all strand representatives to ensure that deliverables are cross-pilot as well as pilot specific.

7.2. WS6-1 Ensure wide consultation and dissemination of project to LAs (at correct officer levels)

Valuable support has been received from WMLGA throughout the project.

A colour leaflet outlining the progress of the project was produced and a series of newsletters was circulated widely:

[Link here to Expo glossy leaflet and to Newsletters](#)

All West Midlands Local Authority senior officers have been invited to a learning event on March 22nd to be held at Redditch Council. This will allow the BM team to review the content of this report with all West Midlands Local Authorities and also to discuss their possible active involvement in future stages of the project.

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7.3. WS6-2 Disseminate cross pilot reports on potential efficiencies; business case for SBA and the perceived need for a regional or sub regional business index.

This report and its numerous supporting papers will be made available via the web site hosted at no charge to Business Matters by WMLGA:

www.wmlga.gov.uk/businessmatters

8. CONCLUDING COMMENTS FROM THE PROJECT SRO

Conclusion

The Project Board met on March 16th and was pleased to agree that this final report is comprehensive and has met the objectives agreed in the original PID. A lot has been achieved in a short timescale and within a modest budget. This would not have been possible without a significant contribution by all of the individuals from the Local Authorities supporting the project

SRO Comments

It is becoming increasingly clear that the outputs from the Business Matters project are helping a significant number of national and regional agendas. In Business Matters Stage 1, the ground work was done that led to the design of the Business Description Schema. It was not clear at that time how important this schema would be.

During the time span covered by Business Matters stage 2, the importance of the BDS and the SBA has become very clear in the context of a number of regional and national agendas:

The joining up with AWM and BusinessLink to help progress and deliver the business support services agenda is an important step towards multi agency working. Similarly, working with the Better Regulation Executive will help deliver the objectives set out in the Hampton review.

Delivering better support to the business community and improved engagement with them is a key objective within the Local Area Agreement block 4. The work done by Business Matters will help all West Midlands authorities address the important challenge set by the LAA process.

The Business Description Schema itself is becoming recognised as a nationally important standard. Meetings with the Cabinet Office, Defra and other Regional Development Agencies have illustrated how important it is. Business Matters has been the sole representative for all local authorities in the national consortium that has been addressing Business Identity Management and Data Sharing issues. It is becoming increasingly clear that this is an important piece of work to help deliver national priorities and it is gratifying that it is the West Midlands that is leading this work.

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Plans are already well developed to build on this important work. The West Midlands is more advanced in its thinking than any other region in the UK with regard to interactions with business, information sharing and joined up working. It is hoped that future phases of the Business Matters Programme will build on this and reflect well on the West Midlands.

The business case for the Single Business Account has become much clearer. It is not only to realise efficiency gains within local government departments, it is also a key facilitator for true transformation. Indeed, it is probably no exaggeration to say that many of the key national agendas cannot be realised without deploying the standards and processes identified by the Business Matters project

Project Governance

I am pleased to be able to report that the project governance worked well with Board Members sharing the workload involved in the delivery of the strands. All Project Board members gave considerable effort and energy to deliver the objectives within tight timescales and are to be thanked for their efforts.

Project Management

Effective project management was provided by rol solutions Ltd with the deliverables being kept on track and completed within the timescale and the budget set. Their support was invaluable in achieving the project objectives.

The importance of good communications at every stage also cannot be emphasised enough, with the Project Board needing to be very clear regarding what is expected of different partners and also then being able to disseminate the learning effectively.

Next Steps

Given the importance of the contribution of Business Matters to the national agenda, it is hoped that the programme will proceed to stage 3 and stage 4. The funding support from the West Midlands Centre of excellence is much appreciated. Further support would enable the work could turn to continue and further deliverables to be made.

Rita Wilson,

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Lichfield DC, Project SRO

March 2007