DIGITAL STRATEGY

Policy Classification: Strategic

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Policy Lead:	Director of Property Assests
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Contents

Introduction

The Digital Strategy is a key part of our Corporate Planning Framework and has relevance across all the activities of our business. The overall aim of the Digital Strategy is to provide a robust framework within which informed decisions can be made that ensures our future products and services continue to meet our customer needs and exceed their expectations. Only by meeting customer needs and expectations will we ensure the long-term future of Eildon Group and our ability to deliver positive outcomes for our customers and the wider community in which we operate.

Eildon's approach to digital transformation is underpinned by our corporate values;

Caring	We care about what we do, the people we work with and the customers we serve
Committed	We work together to provide affordable, high quality homes, care and support services
Connected	We are part of the communities we serve and believe we can make a real difference
Creative	We are ready to meet the challenges of the future with enthusiasm and new ideas

For the Digital Strategy to be effective we must also ensure that it encapsulates all areas of our work and links directly to our six key strategic objectives.

1. The Eildon Group will ensure the highest standards of governance and partnership working are adhered to, including compliance with our regulatory frameworks.

2. The Eildon Group will ensure it operates within a sound financial framework, protecting our long-term viability while prudently utilising the inherent financial strength of the organisation to meet existing commitments and potential opportunities.

3. The Eildon Group will ensure the delivery of high quality, responsive and affordable housing and support services.

4. The Eildon Group will ensure the delivery of high quality, responsive and affordable care services.

5. The Eildon Group will ensure the delivery of high quality homes and property asset management services.

6. The Eildon Group will further develop its organisational capacity by reviewing existing practices and investing in its people and the technical infrastructure.

Shaped by our corporate values and directed at meeting our strategic objectives our Digital strategy will seek to ensure that as an organisation we will:

- handle all data, be it customers, Board members, staff and all other stakeholders in a safe and secure manner, with data used to deliver appropriate services.

- develop a customer contact centre which will be the first point of call for all engagement with the group and, for the majority of contacts, the point of resolution.

- conclude our review of the options of offering a 24/7 service based on our analysis of customer demand. It is likely than any enhancement in our out of hours customer services are likely to be outsourced in a manner similar to our existing relationship with Hanover HA. We would also wish to move as many out of hours contacts to a self-service channel and thereby identify the precise requirement for an out of hours service beyond the current provision.

- utilise scarce resources in the most efficient manner, through the ongoing improvement of business support services, processes and systems and by having a digitally enabled, mobile and collaborative workforce working in a flexible and agile manner

- deliver our housing and care services in an effective customer focussed manner with customer engagement at the centre of service design

- ensure our assets are optimised through intelligence led management and investment programmes

- develop personalised support and growth strategies for staff and continue to invest in appropriate Digital solutions.

- move as many of our processes to an automated status. Through the use of computers and computer software the processes that have been automated require less human intervention and less human time to deliver.

We will ensure that there is in place a clear business objective of demonstrable business improvement through the implementation of new technological applications before new technology is applied.

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What we will achieve during the Digital Strategy period 2018/21:

By the end of this strategy period we would wish to see ourselves as an organisation which has fully embraced the transition to a functioning e-business. This will require all aspects of business delivery and our governance structures, where it is viable efficient and logical, to have moved to a digital platform with greater usage of automatic process flows and self-service which will encompass customers, customer representative bodies our Board and our staff functions.

We also require to recognise that this is now an ongoing rolling programme which will continue beyond this strategy period. No doubt some of the measures implemented under the auspices of this strategy will be overtaken by technology and may become obsolete in a relatively limited timeframe.

However, whilst recognising this, we need to ensure that these time limited functions are kept to a minimum and that the key aspect of this strategy, setting the direction of travel, remains at the forefront of our activity. This direction of travel is to ensure that we remain an efficient business, responsive to our customers changing needs, offering them choice, convenience, excellent service and value for money all of which is delivered by an organisation which has a fit for purpose governance structure, a fully embedded ethos of effectively managing scarce resources with a supportive but demanding working environment for our whole staff team.

To achieve the above the strategy identifies three key workflows for implementation. These workflows will be clearly linked to our strategic objectives and the remainder of this strategy will set out the explicit link between the workflows, our strategic objectives and the practical actions we will take to implement these.

The Digital Strategy 2018/21 will be delivered through three workstreams outlined below which will then be broken into works packages linked to our six strategic objectives.

The workstreams are as follows:

1. Working Smarter
2. Cloud Based Infrastructure
3. Self-service

Details of each workstream are detailed overleaf:

1. Working Smarter

The key objective of the Working Smarter initiative is to ensure that we have a workforce able to work flexibly, where and when it best suits them, their customers and service users and the wider business needs, and managed by results.

- A more mobile and effective workforce is considered by us as one of the key enabling factors for the transformation of service delivery. This includes both the inhouse teams and the extended workforce provided through our delivery partners.

- Staff will use technology suited to the work style and requirements of the role. This will include devices and applications as well as secure connectivity for wherever they are, with the capability to also work off-line.

- Efficiencies will be gained through the extended use of automated technologies so that staff can focus on the value-added activities that their professions provide and be better aligned to the needs of service users. This builds on the technological capabilities used by our Customer Services Centre to manage enquiries and service requests from the public, and through the self-service components of the website.

- Productivity enhancements will be supported through an extended use of scheduling technology to better align service demand with resource availability.

- The application of business rules in automated process flow enables a lighter-touch, service delivery model, where staff intervention is only required when appropriate and not at every stage, in every case.

Core focus of the Working Smarter theme:

People	Support to utilise our evolving e business systems, and in particular the development of a mobile confident workforce for staff working within the community
Automation	Utilise workflow and scheduling technology to optimise and automate more processes, reducing manual intervention and unnecessary face to face contact for service delivery
Devices	Transition away from desktop computers and companion devices to using Windows 10 laptop computers, tablet computers and smartphones aligned to work style
Connectivity	Extended use of wireless and 4G networks
Security	Use of managed devices for all business activity running
Property	Re-purpose key buildings to support a more mobile and collocated workforce, including provision of hot desk facilities located in our care development, available for use by any staff member
Tools	Extended use of Skype for Business telephony (extension of video conferencing, digital minute taking

2 Cloud Based Infrastructure

The delivery of the Working Smarter objectives will be enhanced through the introduction of a flexible, scalable and secure cloud infrastructure where service cost is tied to applications and usage and user experience is managed.

- Our direction of travel includes the transition away from owning and operating a data centre and all the associated infrastructure (servers, storage, switches, racking, power, air conditioning etc.).

- The transition to using off-site data centre services, commonly referred to as cloud services is currently under way. Through the use of SharePoint and Office 365 our business needs, out with our core Management Information Service, are defaulting to a cloud-based infrastructure

- Post 2019 we require to have in place an approved business case for cloud services which incorporates our Management Information Service, currently provided by Aareon QL. Although the model works in a reasonably effective manner, we are currently investing significant resources both in terms of people and finances to increase its effectiveness. We need to develop a full business case for transitioning to a MIS which is a cloud-based model in order that we can move away from the remnants of our data centre as it increasingly reaches obsolescence.

Core focus of the MIS cloud services theme:

Discovery	The discovery phase assesses the cloud options, produces the business case, makes recommendations and starts the activity to optimise the current MIS in readiness for a cloud model
Requirements	The requirements phase identifies the full set of services and outcomes required for a cloud-based service model and produces the delivery blueprint
Procurement	The procurement phase is the process to identify and approve the best solutions, partners, plans and contracts. A blend of safe landing with innovation and enhanced applications will be sought
Design and build	Following contract procurement completion, the design & build phase involves the supplier in fully identifying infrastructure requirements, designing and building the new infrastructure and confirming transition plans
Review	Review the process and the outputs of the design and build period and move to implementation
Implementation	The implementation phase is the transition to go-live by the cloud service provider, with the user experience managed throughout the process. A new ongoing support model will be established, and current data centre services will be decommissioned
Review	The review the whole process and measure outputs against targets set out in the final iteration of the requirements document.

3 Self-service

Increasingly our customer base would like to be provided with a range of options of how interaction with us can be delivered. At this time, we can offer direct face to face contact, telephone contact and written contact, letters and e-mail. What we do not offer is a self-service option.

We have recently introduced our new website which has improved significantly our outward communication and has put in place the infrastructure for the delivery of inbound communication in terms of self service by our customers.

- We now need to build a superstructure that will allow a full range of self service options to be available to our customers.

- We need to look at the differentiation of self service activities and introduce these on a managed basis introducing initially one-way services where we make available information to customers in order that they can check on their account or repairs they have reported.

- Subject to a successful implementation of one-way information pull to customers the system would then expand to two-way communication where customers can order a service which we will then deliver which would include ordering a repair or making a payment to their account.

- We would wish customers to be able to utilise a self-service function through any device computer, table or mobile phone through the provision of web and app-based connectivity.

Core focus of the Self -service theme:

Discovery	The discovery phase assesses the current website's capacity for self-service and how this links to the existing MIS system in order that any form of self service can become a reality
Resources	Having identified the requirement for the website/MIS interaction and the outcomes required from a self-serving portal we need to identify what how and who will be required to move to this model
Security	Given the nature of the information which will be available through this portal the highest level of security protocols has to be put in place and rigorously tested prior to any go live situation
Roll Out	A staged process for access both in terms of services and customer availability in order that service testing can be done in a controlled environment. Early adopter customers will be identified to sense check the design and to provide feedback and amendments in the test period.
Review:	Post implementation we will have to monitor on a rigorous basis the flows and outputs from self-services with a keen eye for any potential or actual security breaches

Strategic Objectives

Strategic Objective No1: Governance

What we will achieve during the plan period 2018/21

In terms of governance the key objectives to be met over the period are.

1. We will ensure the governance functions of the group are moved from a paper-based platform to a digital one in line with all other group functions.

2. We will deliver a specific governance structure for digital activity; this structure will be in place to ensure that no developments in transformative activity take place without the appropriate oversight.

3. That our handling of data is of an exemplary nature in order that we meet the standards set out in GDPR and other legislation whilst being able to respond efficiently to requests for access or when required by a regulatory or oversight body and under FOI requests. We will also ensure that there is in place mechanisms for dealing with or breaches or potential breaches should they occur.

Key Priorities 2018/21

- Develop and ensure appropriate and comprehensive structures for managing all digital activity are in place. This will include the handling of data, the development, management and maintenance of our digital transformation and the oversight of group activity carried out by our Board, committees and customer panel.

- Identify/ acquire or develop internally and install an on-line Board portal for all Board and Customer Panel activity, including papers, appraisal ongoing training and all relevant material.

- Deliver our governing members and customer panel services utilising web/cloud-based systems.

- To move all our non-MIS functions and processes to a cloud-based location.

- Utilise the ARC return module within our MIS.

Strategic Objective 2 – Viability

What we will achieve during the plan period 2018/21

In terms of Viability the key objectives which to be met over the period are.

1. We will ensure the Eildon Group remains financially stable during this period of substantial investment, (development, component replacement and digital transformation) by ensuring where required new management systems are put in place in conjunction with the use of our existing control mechanisms.

2. We will embrace the Scottish Government's objective of fair and transparent procurement and purchasing through the use of electronic platforms.

3. We will utilise technology to ensure the seamless integration of our Corporate Planning Strategy and to enhance the ease of access for all who require it to this framework.

Key Priorities 2018/21

- Implement a new risk management system

- Implement a new development viability model prior to any major fundraising activity

- Put in place a full e-purchasing system

- Implement how project banking can be delivered

- Increase scrutiny of performance by developing an integrated performance management system which incorporates the components of the operational plan and the performance indicators.

- Develop a mechanism for collating, analysing and exploiting benchmarking and performance data in a systematic manner. Define the applications best suited to meeting the reporting requirements.

- Fully integrate our component accounting system

Strategic Objective 3 – Housing and Support

What we will achieve during the plan period

In terms of Housing and Support key objectives to be met over the period are:

1. We will deliver improved customer interaction through the use of digital systems.

2. We will streamline our processes through the use of technology, reducing staff time spent on administrative functions.

3. Through the use of mobile technology and the application of 2 above, ensure that colleagues in housing and support functions will have greater resource to engage with our customers on a basis which is more suited to their needs

Key Priorities 2018/21

- Putting in place how we will achieve a functioning Customer Relationship Management (CRM) system by the end of 2018, this will include updating the MIS system with up to date customer details, reworking our customer contact service and training staff appropriately.

- Ensuring the seamless integration between our MIS and SharePoint.

- Ensure we have a comprehensive knowledge of our MIS and its associated modules and that all are regularly reviewed and updated to meet business needs.

- Review the appropriateness of CRM and report on post 2021 roll out.

- Complete full upgrade to QL V4.

- Go live with the use of RentSense and review performance after first year of operation.

- Develop and implement a cloud-based service for Customer Panel which is linked to estate-based representatives. This will operate in a similar manner to the Governing Body portal.

- Ensure the development and management of electronic estate management plans.

- Enhance the capability of mobile working.

Strategic Objective 4 - Care

What we will achieve during the plan period

In terms of Care and Support the key objectives to be met over the period are:

1. We will develop digital systems which will support our expansion into new care provision.

2. We will enhance engagement with existing customers through the use of digital technology to reduce staff input into administrative tasks.

3. We will work closely with external providers to identify and deploy technology which will assist in the monitoring of customer health and safety, in conjunction with providing opportunities to enhance our customers' experience within and out with our facilities.

Key Priorities 2018/21

- Maximise the use of software to deliver services such as rota scheduling.
- Procure and implement electronic care planning management.
- Expand the use of on-line training for staff.
- Utilise technology to improve connectivity between our various workplace locations.
- Enhance the capability of mobile working.

Strategic Objective 5 – Property Assets

What we will achieve during the plan period

1. We will deliver improved customer interaction through the use of digital systems which will include the development of new homes and component replacement as well as property maintenance.

2. We will engage with our contracting base to simplify process to allow greater focus on customer service.

3. We will, through the use of more comprehensive use of information gathering and analysis, refine and deliver more nuanced programmes of new-build, component replacement, cyclical and reactive repairs providing service more in tune with our customers' changing needs.

Key Priorities 2018/21

- Deliver i-contractor in conjunction with our contractors for the repairs by appointment service delivery and for invoice matching.

- Ensure the roll out and use of SharePoint contract management system.

- Develop sustainability framework and how it is monitored.

- Implement the asset management system within our MIS. Review its suitability and report on its effectiveness for the post 2021 period.

- Enhance current arrangements for monitoring and managing our compliance function.

- Enhance the capability of mobile working.

- Develop SharePoint system for working with design teams/contractors.

- Utilising technology to enhance customer knowledge of expected outcomes.

- Full functionality of sharing technology with our development consultants and contractors.

Strategic Objective 6 – Continuous Improvement

What we will achieve during the plan period

In terms of Continuous Improvement, the key objectives to be met over the period are:

1. We will digitise all information relating to staff.

2. We will continue to develop new means by which customers and the Group can interact with each other.

3. We will embed a culture where digital transformation is an engine of continuous change aimed at improving customer services and value for money

Key Priorities 2018/21

- Ensure management of all staff records is migrated to the Cloud SharePoint environment

- Implement Softworks time recording system

- Establish expertise to develop a series of electronic forms to streamline our business processes and take advantage of new digital infrastructure

- Review digital transformation programme and develop new Route Map for on-going digital transformation programme activity

- Further develop our website and implement the delivery of customer interactive services

- Encourage the use of social media opportunities for both customer engagement, promotional purposes and for staff and Board engagement

Review

This strategy should be reviewed within three years unless required earlier due to changes in the law, regulation, best practice or requirements of the Association.

Action Plan

In 2018/19 we will deliver the following;

By August 2018 we will have carried out the following activities:

1. Upgraded the phone and Broadband network in conjunction with Vodaphone
2. Completed the QL transition to version 4,4
3. Selected the care management system and;
4. Migrated the following departments fully to the SharePoint environment

   - Maintenance
   - Company
   - Human Resources

   After the completion of these aspects of the digital transformation strategy we will plan our ongoing activity for the remainder of the strategy period to complete the following by October 2018.

5. A status review on all current digital activity, identifying outputs, timelines and resource requirements to ensure completion.
6. A programme for the completion of current activity, which identifies and smooths any pinch points.
7. A programme for 2019/21, which is based upon a clear understanding of what, why, when and how much is required to deliver this strategy.