

Running a successful project

The delivery of a successful project does not just happen. It requires the careful planning and management of all the resources involved, underpinned by the right project leadership and governance structure.

Digital Channel Shift Programme

The Digital Channel Shift Programme was set up to help councils and their partners to promote greater use of online tools and technologies for the benefit of both their customers and staff.

The aim is for the digital tools and solutions created through the programme to be reused by other councils and contribute to the wider work to transform local public services.

Focus on success

Other briefing notes in this series cover important project management issues such as:

- the benefits of an agile approach
- user research and testing
- successful stakeholder management.

This briefing note covers the overarching role of project management which includes overseeing the full project life-cycle, managing and coordinating the various project elements and dealing with the issues that are core to success.

Get the right people

Getting the right people in place to deliver a project sets the scene for success.

For example, the project manager has day-to-day responsibility for keeping the project on track, including overseeing the development phase, engaging users, managing and keeping stakeholders up to date on progress and overseeing the project team to deliver the overall outputs and outcomes.

Everyone who has a role in the development, delivery and promotion of the project – including the development team, the service teams, and those on the frontline, as well as external suppliers and other partners – must be engaged in the process from the outset. (For more information see our briefing note on stakeholder management.)

Meanwhile the Senior Responsible Officer will be key to unblocking problems, championing your project, acquiring resources and ensuring that success is recognised. Therefore they should be chosen carefully to ensure that they are in a position to support and drive the project forward when needed.

Ensure governance

All councils have different structures and reporting lines. However, it is essential that governance arrangements are in place at the outset to ensure organisational backing and

resources are secured and the project continues to receive appropriate support throughout its duration.

Many projects in the LGA programme, for example, reported into existing governance boards overseen by and with direct links to the senior leadership team and members. Regular reporting to these boards ensured both visibility of the project at senior level and focused the project team on progress, delivery and potential risks or barriers.

The project manager needs to keep their SRO, and where appropriate the relevant lead councillor, up to date on the overall progress as well. However, this only needs to be at a high level, that way, if there are issues and their support is needed, they are informed.

It is also important for the core project team to meet regularly to discuss progress, issues, feedback and agree the activities for the next set of milestones. This also provides an opportunity to share successes and provide support to each other.

Plan your resources

A significant number of projects reported issues with capacity that impacted delivery timescales. Personnel changes, long-term sickness, compassionate leave, holidays and seasonal workloads were all factors that could, and did, occur during projects putting delivery behind schedule.

For example, many projects found that extended leave periods over Christmas and summer months led to staff being unavailable to test developments in line with original schedules.

In addition, many services experience seasonal workloads – for example, annual billing in council tax – and the unavailability of specialist staff for research and testing had not been accounted for in all project plans.

It is also important to make sure that you work with your providers, for example your IT supplier, to ensure they are aware of the work. Plus

if they need to put in place any changes to the system, you need to work with them to agree the timescales and requirements so they can put in place the necessary resources to do this. Otherwise you risk delaying your project.

(For more information see the briefing note on successful management of stakeholders.)

Be responsive to change

Be aware of wider council initiatives that may affect your project and their timelines, and make contingency plans for potential delays.

A number of projects encountered events beyond their control that impacted the project. For example, Gloucestershire's archive transformation ran alongside a major building programme to create a new Gloucestershire Heritage Hub. Disruption from this building work meant that the public research room service had to be temporarily re-housed and this impacted the facilities available for the launch of the new service, training events and promotion.

In West Sussex the project scope had to be revised due to a wider corporate review of the county's transformation strategy – which led to a delay in acquiring the new digital tools the team required to deliver the original scope within the project time frame. However, the team took the opportunity to refocus the project to incorporate delivery of a checklist, the need for which had emerged during the discovery phase.

Other projects encountered issues ranging from delays in software licences and upgrades to a change in corporate policy meaning that single sign-on needed to be accommodated in the new digital service design.

In all instances, having the right project management resources supported by an SRO who is engaged and up to speed, as well as appropriate governance arrangements as noted above, in place meant that the teams were successful in navigating the changes and refocusing their projects.

Promote your new services

A channel shift project does not end with the delivery of the core solution. Actively promoting the availability of new online self-service options to the target audience is essential in order to drive take-up and deliver the promised benefits.

To achieve channel shift, these projects used a mix of traditional and more innovative approaches to engaging the public and encouraging them to use the new online services.

Sunderland has been running a general 'do it online' campaign in recent years to encourage residents to make the council website their first port of call for information and service requests. When a particular service has been redesigned and launched – such as the waste services in the LGA project – it became the immediate focus in the overall communications. Activities included e-bulletins, information and adverts in resident publications and on a range of council communications. Messages directing people to the new online channels were included on social media, email, text, direct mail and automated voice messages.

Lincoln took a targeted approach to engaging a niche group of users: landlords of student accommodation. The team contacted all landlords in the city directly and explained the speed of turnaround now available via the online self-service channel, compared to the timescales involved in the traditional process and subsequent delay in service delivery – as a result, they successfully engaged 100 per cent of landlords in using the self-service options.

In Waverley the project team recognised that driving behaviour change both internally and with end-users would be a continuous process of awareness-raising and reinforcement. An ongoing internal and external communications campaign was therefore designed to promote self-service and the new online services over the long term.

Uniquely, Rochdale Borough Council dedicated a full-time resource to driving customer behavioural change in order to deliver sustainable channel shift and targeted benefits.

Methods successfully used by projects in the programme included:

- one-to-one help showing customers how to use the new service – and help improve their wider digital skills
- support officers ‘floorwalking’ in customer service centres to engage with customers and encourage them to try the self-serve options
- signage and adverts on TV screens in customer centres to promote the ease of self-service while people waited in queues
- print promotions, including leaflet campaigns to accompany the annual billing cycle posters in libraries, job centres, and the civic centre; adverts in magazines published by the council and other local public and third sector organisations; and articles in local and council publications
- email campaigns and additional information in email footers and other email communications, for example, highlighting that a query being answered by email could be done in future without delay online
- social media campaigns
- website banners flagging new services
- telephone IVR (interactive voice response) messages telling customers on hold that they could find the information/service request online
- call centre staff reminding people that they could access the service online or talking them through how to use the online service.

Metrics

Performance monitoring is essential in order to track progress and realise and capture benefits. The first step in this is to ensure a solid baseline and key metrics at the project outset that can be compared ‘before’ and ‘after’ the change.

The goal is to identify and agree the metrics that can be monitored throughout the project and be used to accurately calculate benefits

delivered. This can be difficult as the ‘before’ and ‘after’ digital service can be very different. Common metrics used by projects included:

- number of face-to-face appointments
- call volumes
- number of online transactions/use of online forms
- reductions in processing/service delivery times
- reduction in overtime or use of agency staff to help out at end of year/peak times
- reduction in printing and postage costs
- sign-up and unsubscribe rates
- click-throughs on web links
- keyword use in searches
- overall web analytics and user journeys
- customer feedback (online and face-to-face)
- late payment figures.

Some of the projects on the programme struggled with accurate monitoring of metrics when key indicators changed as new processes evolved or initial baseline assumptions were found to be inaccurate. This resulted in more work to approximate baselines, eg using time and motion exercises to capture the ‘as is’ and the new process, or work to extrapolate volumes where data was not available.

“Without metrics it’s impossible to understand the impact of a change. Hence you can’t measure whether that change has been successful. So we obtained the required metrics in the initial stages of the project to enable us to understand the effectiveness of the changes we made over the course of the project.”

Asam Jan, Transformation Project Manager, Rochdale Borough Council

Top tips

- Get the right governance structures in place at the outset.
- Recruit the right people with the right skills for the team.
- Apply agile methodologies (see LGA briefing note) where appropriate.
- Undertake thorough user research and engagement (see LGA briefing note).
- Engage and manage your stakeholders (see LGA briefing note).
- Identify and agree your metrics before and during the project.
- Take account of and plan for seasonal workloads, staff illness and holidays.
- Engage and plan any necessary work with your supplier.
- Include contingency time in the project planning.
- Include promotion of the new service to users as a core part of your project plan.
- Make use of the Government Digital Service standard:
<https://www.gov.uk/service-manual>.
- Take advantage of the Government Digital Service Training Academy:
<https://gdsacademy.campaign.gov.uk/>.
- Expect the unexpected.



Local Government Association
18 Smith Square
London SW1P 3HZ

Telephone 020 7664 3000
Fax 020 7664 3030
Email info@local.gov.uk
www.local.gov.uk

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