# Agenda

**Quick Introduction to Engage Process**

## Process Improvement and Service Redesign
*Rachael Dixon, Somerset Council*

**Q&A**

# 400+ Customers globally

80+ Customers in UK
200+ partners

| | | | | |
|---|---|---|---|---|
| **Somerset Council**<br>Service Redesign and Cost Savings | **Leeds Federated**<br>Change Management | **RUGBY Borough Council**<br>Housing, Applications and Implementation | **EDINBVRGH THE CITY OF EDINBURGH COUNCIL**<br>1000+ processes in 2 years £ 700K Saved | **South Tyneside Council**<br>Identifying efficences |
| **SKANSKA COSTAIN STRABAG**<br>HS2 Organisational Efficiency | **CHELTENHAM BOROUGH COUNCIL**<br>People Driven Change | **Gateshead Council**<br>Process Improvement | **L&Q**<br>New Housing Management System | **Tewkesbury Borough Council**<br>Customer service improvement |
| **Hyde**<br>Voids Processes | **wrexham CYNGOR BWRDEISTREF SIROL wrecsam**<br>ASC Redesign & Digital Change | **Teignbridge .gov.uk**<br>Customer Experience | **STROUD DISTRICT COUNCIL**<br>Continuous Improvement | **Gloucestershire COUNTY COUNCIL**<br>Adult Services |

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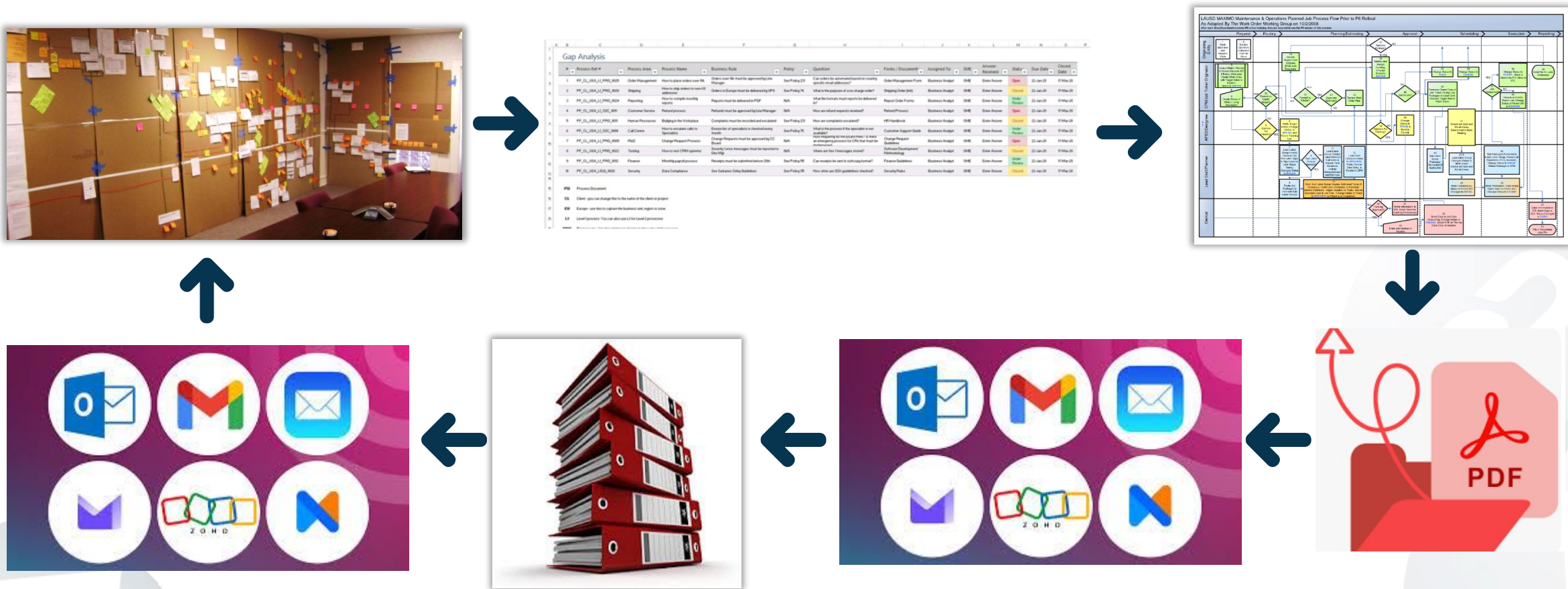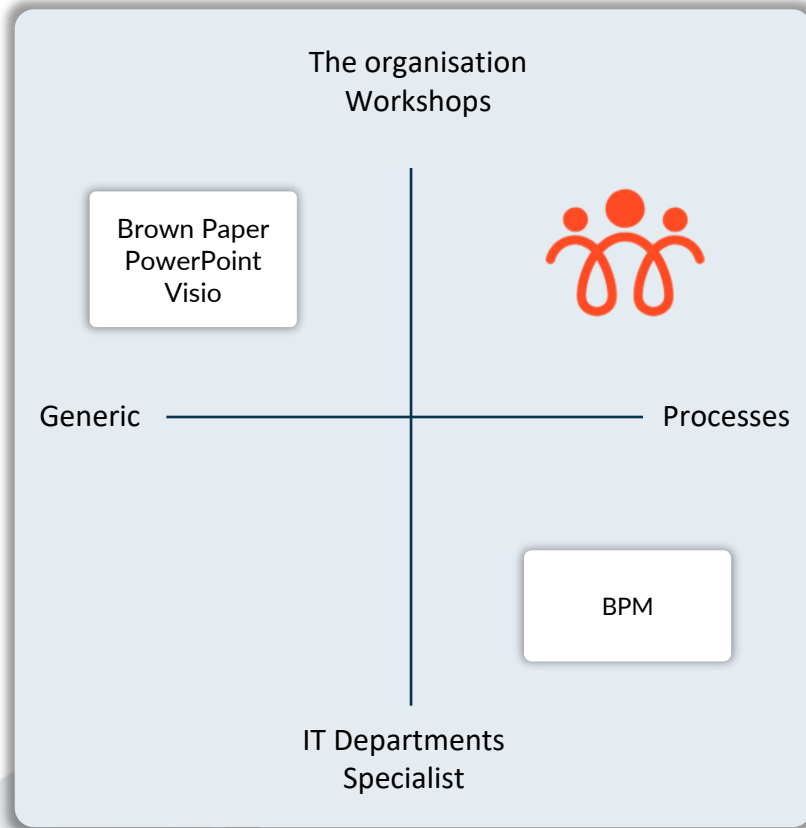
# How do we improve processes?



A single platform for mapping, discussion & exploring, sharing and feedback

EngageProcess

# Design requirements to truly engage employees

The organisation
Workshops

Brown Paper
PowerPoint
Visio

Generic — Processes

BPM

IT Departments
Specialist

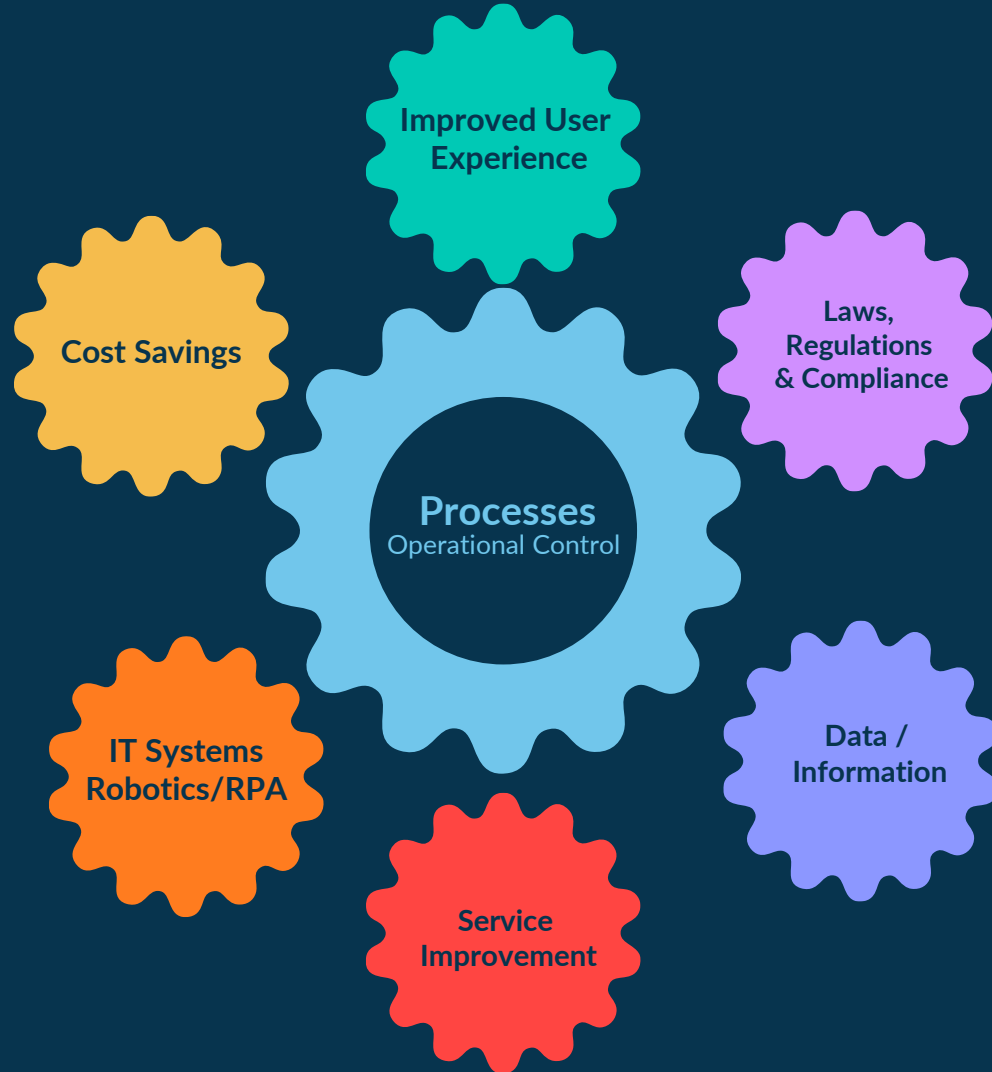| | | | |
|---|---|---|---|
| **Intuitive Icons** Everyone participates | **Automatic Process Mapping** | **1 Single Screen** Simple & Workshop Focus | **Tables** Central database for data fields |
| **Show/Hide®** Lots of detail, show when needed | **SwitchView®** Swimlanes for each data set | **Calculations** Results & Awareness | **Customer**–**Internal**-**Non** value added |
| **Handbook w/ StepView®** Direct & Detail | **Feedback** Continuous Improvement | **Findings** Suggestions to **Teamboard** | **Extensive Reports** (GDPR, Risk, Efficiency, etc.) |

**SaaS** - Instantly up & running

EngageProcess

# Central role for process management

**Improved User Experience**

**Cost Savings**

**Laws, Regulations & Compliance**

**Processes**
Operational Control

**IT Systems Robotics/RPA**

**Data / Information**

**Service Improvement**

**1** **Projects Up to date with changes** (In control and dynamic)

**2** **Necessary detail** in the right place

**3** **Synergy**: All projects faster and cheaper

**4** **Employees participate through their work** (People driven change)

**5** **Overview – Insights - Action**

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The internal dynamics are only growing

Education  Environmental  Finance  Highways  Housing  Leisure  Libraries  Planning  Revenues & Benefits  Social Care  Transport  Waste Services

**Process Management**

**Foundation for Overview - Insights - Actions**

New

New

Improve

Improve

EngageProcess

But how do you start?
What is your journey?

# 👋 Introduction

## Rachael Dixon
### *Service Design & Change Lead, Somerset Council*

• Previously led **Service Design and Process Redesign** at **Sedgemoor District Council**, where I co-authored the Process Design Manual and implemented its use.

• **Customer Access Programme** – Creating a Digital Sedgemoor, not just the organisation but the people and the place.

• Now leading the **Service Design & Change** function for **Somerset Council**, following Local Government Reorganisation (LGR)

• Happy place is User Driven Change and Co-design

Build belonging

# Process Redesign Manual

## Purpose Beyond SDC: A Strategic Revenue Opportunity

How to do Process Redesign well in Local Gov.

Agile meets minimal governance

**Key Aims:**

- Run multiple process redesign projects in parallel with minimal oversight

- Embed corporate principles and strategic goals into service design

- Maximise use of existing capabilities

- Continuously refine solutions for customer needs and efficiency

- Align benefits capture, management, and realisation with the approach

- Provide accessible, self-guided support for all participants—no prior experience needed

# The Journey - LGR to now

## Getting comfortable with uncertainty

- Returned from Maternity leave in October 2022 to a new world!

- Financial Emergency🚫

- Programme Lead for Organisational Design and Innovation
    - Org Design Principles
    - Service Blueprints (structures)
    - Target Operating Model

- Prioritisation Approach – addressing an issue of too much to do, not enough resource

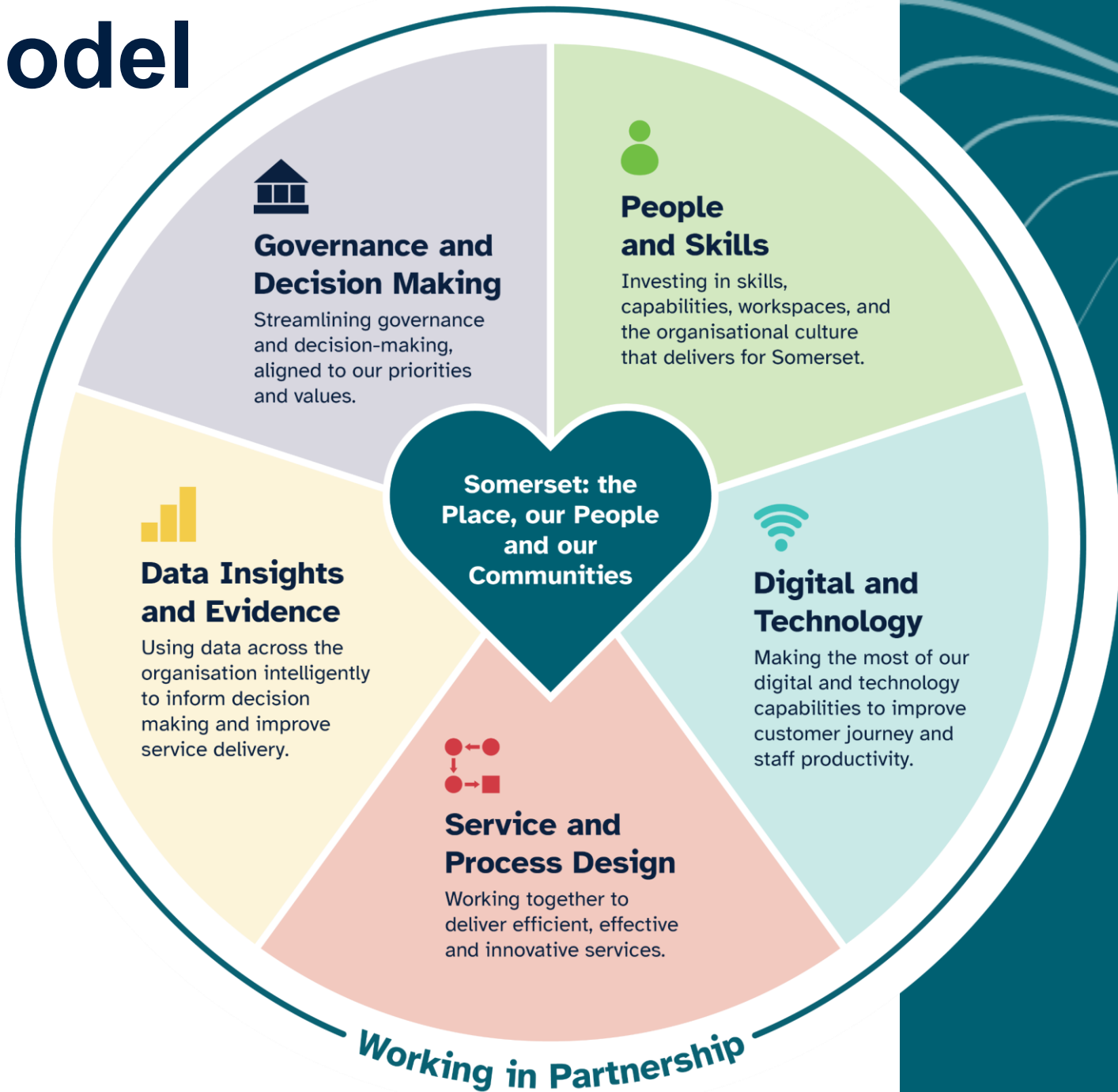- April 2025 confirmed in post as Service Design and Change Lead

# Target Operating Model

- Important to know what does good look like? What is the vision?
- Compass not a map
- Deliberately non-service specific
- Created collaboratively with SMEs, Staff, Leaders and the Executive
- Working groups with Service Directors
- Staff feedback
- Exercised regularly at Informal Executive and Executive
- Am I a TOM or am I framework?

*"In every change we will use the TOM to challenge ourselves and the way we do things"*



**Governance and Decision Making**

Streamlining governance and decision-making, aligned to our priorities and values.

**People and Skills**

Investing in skills, capabilities, workspaces, and the organisational culture that delivers for Somerset.

**Somerset: the Place, our People and our Communities**

**Data Insights and Evidence**

Using data across the organisation intelligently to inform decision making and improve service delivery.

**Digital and Technology**

Making the most of our digital and technology capabilities to improve customer journey and staff productivity.

**Service and Process Design**

Working together to deliver efficient, effective and innovative services.

**Working in Partnership**

# Service Design Companion

## Exploring the right approach for Somerset

- New environment, new peers with new experience and new learning

- Reviewing the entire contents plus looking into bite size information

- Examples: Project stages now different – Transactional vs Place services – redesign vs fundamental reshape or new service

- Working with SMEs in Finance, HDRC, Data, ICT and Digital

- Joining networks with other organisations to learn and evolve together

- Training for our Business Analysts in using Engage Process and creating internal communities of practice

- Workshop to understand Engage Process capabilities and best practice

| | | | |
|---|---|---|---|
| **Feasibility** | Environment for change<br>Understanding opportunities<br>Stakeholders | | Service is supported |
| **Diagnostic** | Understanding customer needs<br>Setting expectations<br>Research and User Stories | ⭐ | Service is supported |
| **Design** | Proposing a new set of processes<br>Co- Designing solutions | ⭐ | Service is supported |
| **Develop and Build** | Develop and deliver iteritively<br>Test and Review | ⭐ | Service is supported |
| **Live** | Launching new processes<br>Business as usual<br>Benefits Handover | | Service is supported and then owns |
| **Improve and Learn** | Continuous improvement<br>Measure and learn<br>Benefits Realisation | ⭐ | Service is supported and then owns |

Strive for excellence

# One Team approach

Collaborating across disciplines to create multidisciplinary teams

Ensuring the appropriate skills are placed in the correct roles from the outset

Designing, gathering, mapping and innovating together – live – in one space

Being evaluated for Somerset while maintaining a streamlined Design Team

Don't be constrained, find what works for you
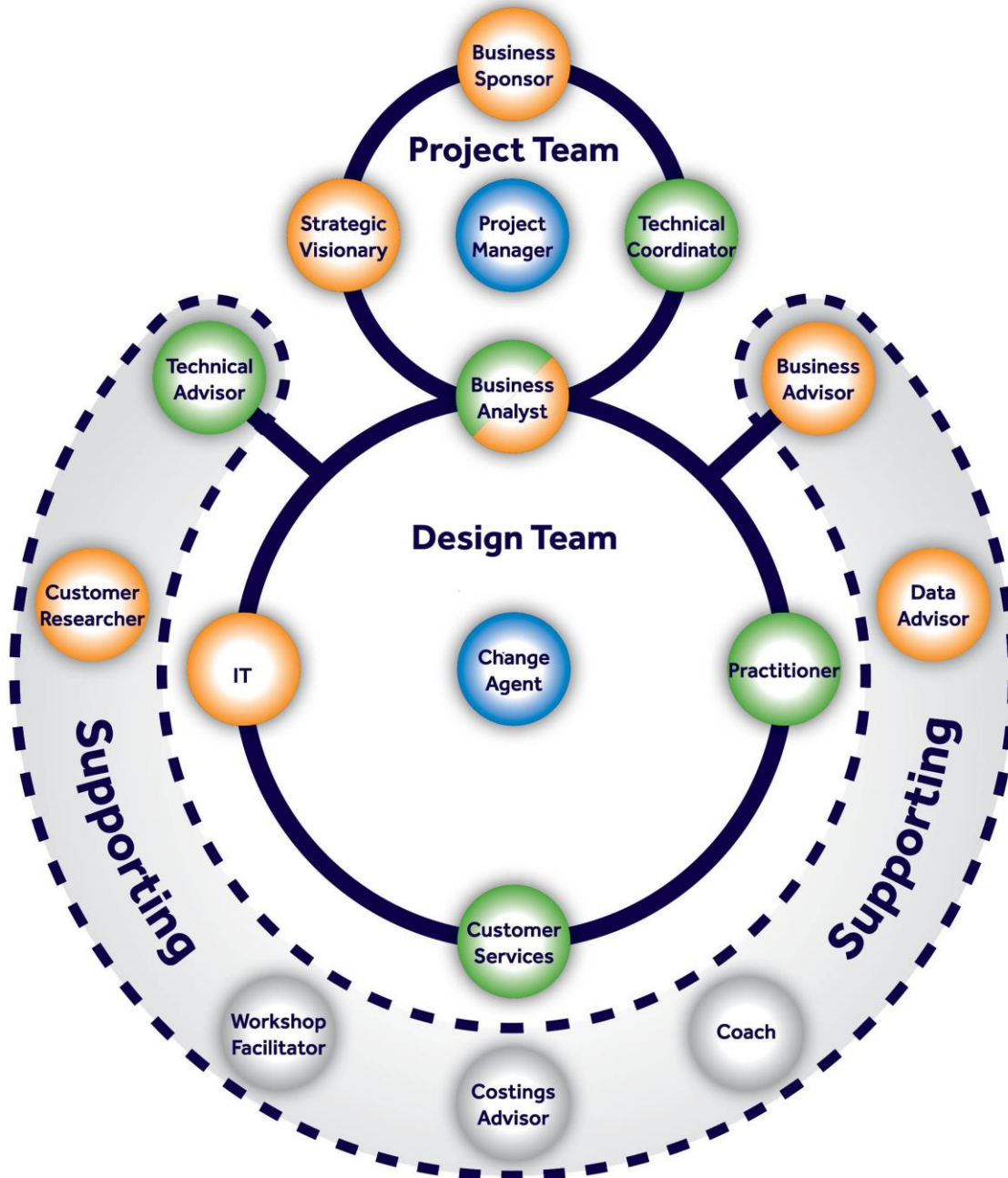
# Next Steps

- Start socialising Service Design and make use of Innovation Spaces

- Finalise and share the Service Design Companion

- Service Design Principles

- "On a Page" bitesize information

- Videos, workshops, collaboration spaces – a hub!

- Just start – get good examples of us working with services

- Create a Service Design roadmap for Somerset in line with the new Transformation Plan

- Strengthen partnerships with other councils and external organisations to exchange knowledge and resources

- Highlight progress and tools (e.g., Engage), being transparent about successes and challenges

*"Take a step, learn more, take the next step, learn again..."*

**- Duncan Sharkey** – Chief Executive

# Challenges

Or Opportunities to do something better?

- Resources – the recent restructuring of the workforce has created pressure on services.

- It is essential to involve subject matter experts in the redesign process, but how can they maintain service continuity?

- Financial crisis hangover – innovation and autonomy are necessary.

- Local Government faces recruitment difficulties for DDaT skill sets.

- The LGR environment has been at times uncomfortable, leaving a sense of lingering organisational trauma.

- We are entering a new era where the advantages of process mapping might not be fully recognised.

- There is a tendency to rush into solutions without sufficient exploration of the issues

# Over to the Q&A

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Council