Digital Mail Helps HMRC Process Customer Correspondence More Quickly

Central processing of post and responses efficiently allocates documents to the right teams and eliminates internal mail costs

The Situation

The UK tax authority, HM Revenue and Customs (HMRC), is committed to becoming a fully accessible digital organization, continuously introducing new online customer services and automating internal operations. As part of this, HMRC is introducing document scanning for staff to deal with digitized customer correspondence from their computer screens. Known as Digital Mail, this is the first large scale implementation of Capgemini's Case as a Service (CaaS) managed service solution, and a leading example of Government as an early adopter of a fully managed digital correspondence lifecycle.

The Solution

HMRC's Digital Mail service scans customer mail, categorizes it, and creates a customer case file that is automatically assigned to a work queue for the team with the relevant skills and capacity. Correspondence workers review all documents related to the same customer and can share files with specialists to help answer questions. Helpline advisers can also use the system to respond to telephone queries and make small case additions; managers have detailed reporting and trend analysis capabilities.

When correspondence workers finalize an action, they create response letters or forms, which are processed in a print and mail center, and a digital copy is added to the customer record. Only staff with relevant entitlement can view files, which the system securely deletes when records are no longer required.

The Results

HMRC correspondence teams can now work on post that has been converted to a digital image within 48 hours of it arriving in the post room. Digital Mail will eliminate internal mail costs for around 18 million items of Personal Tax after a year, and it speeds up the process that could previously take anything up to three weeks.

Central digital storage and scanning of incoming and outgoing posts allows correspondence workers, helpline advisers, and tax experts to have an accurate view of customer interactions so they can respond quickly, using up-to-date, concise information. Response letters are printed centrally, which contributes to efficiency and energy savings. The end-to-end process is more efficient, so customers receive replies 2–3 days quicker than before. HMRC has commenced their plans to extend the solution to all relevant customer-facing teams by the end of 2016.

HMRC will use management information about digital mail operations to optimize resource allocation to teams around the UK. Over time, accurate information about the status of customer mail will be used to reduce the volume of call center queries, improve customer experience, and meet customer response targets.

How HMRC and Capgemini Worked Together

HMRC's digital transformation plan included investigating how to digitize Personal Tax (PT) customer correspondence. Following an assessment of the document management market, HMRC selected Capgemini's Case as a Service (CaaS) solution, which is a hosted document-centric case management offering based on proven EMC technologies. CaaS is a standard preconfigured managed service solution built on Open Source and Open Standard components and implemented using Capgemini business process design and project methodologies.

Digital Mail was an agile delivery, led by a joint team from HMRC's Digital Mail Service Team, PT Change, and Capgemini. Working together, we regularly released small pieces of functionality, and iterated the solution based on users' feedback. The discovery phase gathered and developed requirements for a high-level understanding of user needs, the technology and service landscape, and initial prototypes. The next phase was a four-week alpha that built a working prototype to test the model for handling mail digitally and give further insights into the return on investment to take the business case to the next stage. The beta phase included several projects to build the end-to-end prototype. Agile methods delivered working software early, and continuously refined, tested, and released in three-week Sprint cycles.

The full solution was developed in twenty weeks, during which time it processed 36,000 items of incoming post, routing it into work queues for over 100 staff in three geographically spread sites within 48 hours of receipt. It demonstrated a significant reduction in the cost of moving, securing, and storing paper, as well as improving user and customer experience.

Roll out of the solution is continuing in HMRC with over 6.1 million items received, assigned to one of 93 queues, and routed to over 12,000 staff members across Personal Tax, Business Tax, Benefits and Credits, and Debt Management and Banking. More queues will be added as the solution rollout continues. Teams are deployed onto work queues based on skills and experience, and individual correspondence workers access the work queue from HMRC sites throughout the UK.

Crucially, for the first time, helpline advisers will be able to view letters and forms submitted by customers. This will make an important contribution to improving the customer experience and reducing call volumes.

This is just the start of HMRC's Digital Mail transformation journey. The PT solution is fully scalable, and HMRC plans to extend Digital Mail to all relevant customer-facing teams across its different directorates. HMRC chose CaaS for Digital Mail to take advantage of the cost benefits and speed of implementing a preconfigured solution that integrates the latest EMC technology and best practice service management for ongoing delivery.

The wider solution expects to deliver the following benefits:

- **Efficiency derived from virtual teams:** Work can be routed around the UK immediately, optimizing resource usage and eliminating internal mail transportation and storage costs;

- **Enhanced operational information:** Detailed Management Information reporting and trend analysis is easily provided (previously not available or laborious to produce); and a "to the minute" operational dashboard gives greater management control by enabling granular and speedy management of the operation, as required;

- **Improved customer experience:** Up-to-date status information on customer mail, allowing HMRC teams to respond quickly to correspondence, which will reduce call center queries;

- **Improved regulatory compliance:** Customer response targets will be achieved through better real-time mail item journey information;

- **Further potential expansion:** HMRC is integrating customer communications across all contact channels and joining up customer information held in different departmental systems. Digital Mail will be enhanced to manage customer email and fax, as well as scanned post, and will provide access to customer details from a range of internal systems. HMRC will also expand upon the number of digital forms that deliver their work directly via DMS and exploit wider opportunities to utilize robotic automation and provide customers with a fully paperless solution with outputs issued through a multi-channel central output function.

For more information on this project, please contact:
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Approved by

HMRC Press Office

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