


# Case Study: Somerset West and Taunton Council



With a population of approximately 135,000, **Somerset West and Taunton Council (SWT)** captures and processes vast quantities of information, from multiple sources, on a daily basis. The broad remit of the council, encompassing everything from bereavement services to housing support, means much of the data handled is highly sensitive and thus must be managed in compliance with data regulations.

## The Situation

Like many councils across the UK, the processes and systems at SWT were ill-equipped to monitor, categorise and govern the large amounts of data being processed daily. With such limited visibility over its data assets, gathering reliable data insights and ensuring compliance with GDPR were virtually impossible.

Recognising these challenges, SWT's leadership committed to a major digital transformation programme with the goal of enhancing user efficiency, reducing risk and improving security.

Alison North, Director of Internal Operations at SWT, explains, "As SWT's engine room, internal operations is responsible for ensuring things run as smoothly as possible, both for our employees and our customers. I have three priorities in my directorate: digitalisation, modernisation and quality. Introducing best in class technologies that enabled us to deliver an effortless and trusted customer service was critically important in realising these priorities."

## Choosing a Partner

As with all public sector contracts, SWT had to follow stringent procurement guidelines, setting out the key criteria for vendors and detailing the outcomes it sought. Looking beyond value for money, SWT wanted a high quality, reputable solution that could be delivered at pace, by a single vendor.

SWT looked at several different information management solution suppliers, assessing their capabilities against its objectives. But it was Automated-Intelligence that stood head and shoulders above the rest. What the council particularly liked was that they did it all; from the analysis, right through to the migration.

They were the only supplier that provided data analytics, migration, cleansing and email integration and they truly automate the entire data management process on Microsoft.

## Working with Automated Intelligence

Utilising Automated Intelligence's data analytics solution, the scale of SWT's data issue became immediately apparent. Of the data the organisation had stored, 86 percent was duplicate, redundant or obsolete.

Armed with this knowledge, and Automated Intelligence's support, SWT set about reducing staff personal drives from terabytes to 300 megabytes, developing a functional file plan, in line with the local government functional classification scheme, and educating employees through interactive SharePoint workshops.

## Outcomes

Working in partnership with Automated Intelligence, the Digital Modernisation and Records Management Programme Lead, Michele Noad, completed an organisation-wide information audit to categorise all its data and identify where personal data is processed.

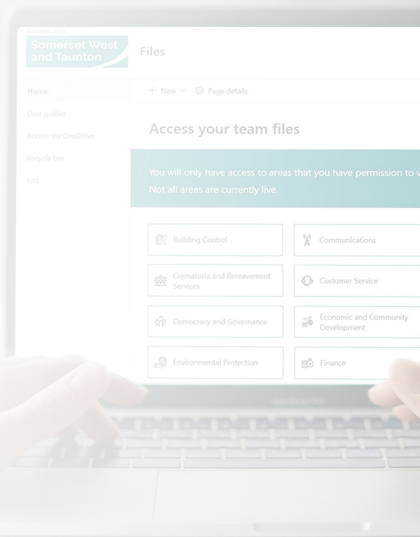
In addition to this, the organisation's retention and disposal schedule has been updated and increased almost seven-fold, from 200 lines to 1,375, ensuring every piece of information is identified and all legislation is adhered to.

This provided the blueprint for Automated Intelligence to build a complete EDRMS (Electronic Document and Records Management System) for the entire organisation.

Commenting on the first phase of the project, Michele states, "Automated Intelligence has completed this work resiliently and effectively.

The automated retention and disposal rules and legislation are visible and transparent to every employee using the system.

The result is a fantastic user experience, making it very easy for them to know that information integrity has rapidly improved. The entire organisation is really keen to move across to this innovative build.



The Solution is clean, modern and very easy to navigate and use. It also identifies personal identifiable data at document level, which will radically improve compliance.”

In addition to the EDRMS, Automated Intelligence also built innovative project and programme sites which enabled the organisation to set up a PMO quickly and effectively, while creating modern repositories to support an agile workforce and improve business insights.

Looking ahead, Michele comments, “Automated Intelligence has provided the core compliant repositories ready for the next phase where we will be supporting the analytics, cleansing and migration. This is where **AI.DATALIFT** will provide impact and real benefits.”

Alison North continues, “We set out to modernise our operations through a digital platform. With Automated Intelligence, we’ve laid the foundations and will continue building a trusted organisation, based on secure, high integrity data that makes things effortless for our internal and external customers.

“More than suppliers, they have felt like our partner throughout the entire transformation process. I am happy to recommend Automated Intelligence to my professional network” says Alison.

Darren Cole, Digital Lead at SWT, adds, “Many organisations that I deal with embark on digital transformation without giving much thought to the information governance implications of their ambitions. This is often on the back of poor and often non-compliant existing information governance arrangements.

“At SWT this was acknowledged upfront and considerable effort has been put in, from the outset, to get the fully compliant corporate file plan and retention scheme agreed and communicated across the organisation.

“Working seamlessly with Automated Intelligence, we have utilised the Microsoft 365 investment to build and deploy the file structure with automated retention into a clean, easy to use and corporately-branded SharePoint Online site. The key to this success has been great communication, enthusiastic and dedicated project staff, and the professionalism and expertise of AI.”

## Want to find out more?

Visit our website for further information on AI and the solutions we offer: <https://www.automated-intelligence.com/>