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Lessons Learnt e-business Strategy Development and Implementing Online Service Delivery

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New Zealand



Presenters

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Lessons learnt

1. Developing e-business Strategy

Prashanta Mukherjee

2. Implementing Online Service Delivery

Maurice Harry

Agenda

Lessons learnt in developing an e-business strategy:

- **Strategy development challenges**
- **Alignment with business strategy**
- **Vision, Value Net and Opportunities**
- **Project Metrics and CSF**

Strategy Development Challenges

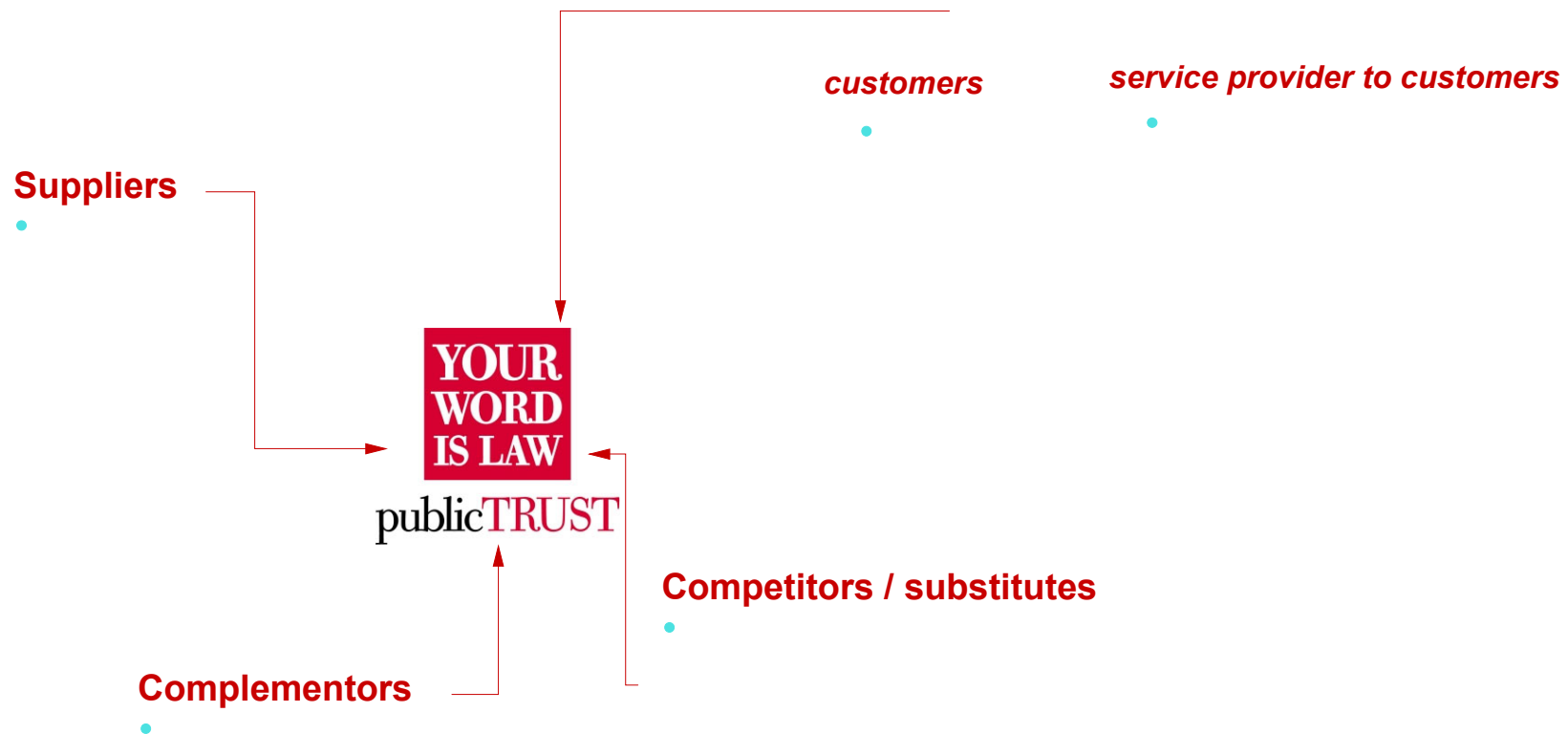
- **Change in market conditions**
- **Impending change in governance**
- **Extreme financial pressure**
- **Flux in executive team**
- **Business strategy uncertain**

Public Trust e-business vision

To use e-business
to deliver trusted tailored experiences
enabling Customers and Suppliers to interact
with Public Trust in a straightforward way
for mutual benefit.

- **Maintains the focus on TRUST**
- **Acknowledges the need to tailor to CUSTOMER CHOICE**
- **Maintains the promise of STRAIGHTFORWARD interactions**
- **Extends the new thinking to SUPPLIERS thus underpinning the PARTERSHIP APPROACH**

Value Net: Leads to opportunities



Example Detail for Value Net

Segment

Needs

Wants

Lawyers
(probate;
processing)

Trustee
companies

Banks (TSB,
People's Bank,
The Big 4)

Prioritisation criteria from business strategy

15.42	Enables CRM strategy and a shift to knowledge-based culture
14.58	Builds Sustainable Competitive Advantage
12.5	Aligns with agreed strategic direction
11.75	Provides essential operational capability
9.67	Is consistent with online brand drivers and values
9.5	Is likely to be accepted by responsible PT staff and able to be implemented
7.92	Leverages from the best of current capability
7.58	Lowers the cost of production
6.33	Maximises 'Trust'
4.75	Supports social responsibility and government policy initiatives

Final e-business opportunities

Consolidated Weight	Opportunity
1604.68	e-CRM
979.47	PT High Value Customer Online Application Capability
682.49	Three
577.85	Four
566.75	Five
565.90	Six

Project metrics and CSF

- **Joint team with consultant**
- **100 Consultant hours**
- **300 PT Joint Team Member Hours**
- **50 PT Executive Hours**
- **Whole of organisation consultation**
- **All decision by PT Executive**
- **4 months elapsed**
- **An ROO (not ROI) approach**



Overview

Lessons learnt in implementing Online service delivery:

- The Concept
- Background
- Wills Online
- Lessons Learnt
- Business Results

www.publictrust.co.nz



**YOUR
WORD
IS LAW**

publicTRUST

Public Trust is New Zealand's largest and oldest trustee organisation, set up in 1873 to provide New Zealanders with independent and reliable trustee services. Our role is to help you protect and manage your family interests and assets during your lifetime..and after your death.

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Centre will benefit community



Wills Online



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New Act

[Click here](#) for information about Public Trust's new legislation.

The Concept



- **Allow Customers to undertake the processing of their own transaction**
- **Allow customers to make their own Will**

Empowering the customer to do for themselves what they could only do with the help of a Public Trust Advisor



Background

- Dotcom boom & bust
- Separate silos v's channel intergration
- Public Trust Act 2001
- Digital economy
- Internal selling

Initial Reaction

Destroying the existing “bricks & mortar” distribution network



Wills Online

- Create e-Business infrastructure
- Water tight security
- Utilizes our Wills Expert System:
 - Wills questionnaire
 - Legal precedents
 - Business rules
 - Will production

Wills Online



Public Trust Online

- Make an appointment
- Contact us
- Change details
- Print documents
- Return home

Information

- ▶ General info
- ▶ Wills online
- ▶ Signing your Will
- ▶ Common questions
- ▶ Estate administration

Your details

- ▶ John Robert Livingston

17 The Avenue
Paraparaumu
04 47473863

Your payment details

Here is your invoice. Please print out a copy and keep it for your records (use the print button on your toolbar). If you have any queries, please [email us](#) or call us on **0800 783 946**.

Public Trust 117-125 Lambton Quay PO Box 5067 Wellington	GST Number: 11-113-35 Invoice Date: 22/07/2002 Invoice Number: 2778		
John Robert Livingston 17 The Avenue Paraparaumu			
Product Description	Quantity	Unit Price	Amount
Will	1	62.18	62.18
Subtotal			\$ 62.18
GST			\$ 7.77
Invoice Total			\$ 69.95

Pay Now

Pay @ Public Trust

Cancel

Wills Online



- Change details
- Appointment
- Contact us
- Help
- Home
- Log off

Public Trust Online

- Make an appointment
- Contact us
- Change details
- Make a Will
- Make a payment
- Return home

Information

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Your details

- ▶ john robert livingston

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04 47473863

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You can download and print your documents now - or print them at Public Trust.

Why print at Public Trust?

If you choose to print your documents at Public Trust we'll legally check them to make sure everything is correct, and print them on a high quality laser printer for you. We can also witness the signing of your document and keep it in safe storage if you want.

All you need to do is make an appointment to see us (an appointment page with some details already filled in will open next). We can normally meet you within 3 days.

What would you like to do?

- [Print now from my PC](#)
- [Print at Public Trust](#)

The next step after printing is signing your Will, then recording the signing details.

Remember

We recommend that you print at Public Trust, so we can give your Will a final legal check before you sign it.

Whichever option you choose we can keep your documents in safe storage. This is a free service. You can drop them in to us, or call us on **0800 783 946** and we'll supply a post-paid envelope

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Print @ Public Trust

Home

Public Trust Online



Public Trust Online

Register now

Login here

Information

- ▶ General info
- ▶ Wills online
- ▶ Signing your Will
- ▶ Common questions
- ▶ Estate administration



Click to verify

Welcome

Public Trust Online is a new service. Our aim is to help make life a bit easier by letting you manage your personal legal documents online.

We've started by putting our plain English Wills online. You can create your own Will here – and come back anytime you want to change it. The Will is legal in New Zealand and FREE if you appoint us to be your executor (the one who carries out your wishes and administers your estate). Otherwise the cost is \$69.95 including GST.

Making a Will online won't suit everyone's situation, but you can get started online and call us for help or advice if you need it. Later we'll be adding other services as well.

How does our service work?

Once you register with us you get a personal home page you can log straight onto whenever you want. There you'll find a record of any documents you've created, even ones you haven't finished. You can create new documents and update old ones – it's easy to do. And you can get in touch with us anytime you need personal help or advice.

- **First visit?** To get started you need to [register](#) first - this will take you about five minutes.
- **Already registered?** You can [login](#) straight away.





Lessons Learnt

The three “C’s”

- Coordination
- Communication
- Commitment
- Focus on the business objective/s
- Control scope creep
- A new business model
- Testing, testing & more testing



Business Results

- Wills Online commenced 1 March 2002
- 2000 registered customers – half male
- Approx 1000 Wills made
- Appointments at Public Trust
- Transfers from internet to desktop
- 2 : 1 email : telephone calls
- - 25% under 30 years
- 75% under 50 years-
- www. = World Wide Wills-

Thank you



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- www.govis.org.nz

- www.prashanta.com