

**STRATEGY AND RESOURCES
29 SEPTEMBER 2015**

UPDATE OF CRM PROJECT

Report of the: Director Finance and Resources/Head of Customer Services and Business Support/Head of ICT

Contact: Joy Stevens/Mark Lumley

Urgent Decision?(yes/no) No

If yes, reason urgent decision required: N/A

Annexes/Appendices (attached): N/A

Other available papers (not attached): N/A

REPORT SUMMARY

This report updates the Strategy and Resources Committee in relation to the Customer Relationship Management (CRM) project and related projects, as Members were asked to receive a further progress report including a medium term plan to exploit the new software.

RECOMMENDATION (S)

- (1) Note the report**
- (2) Note the other improvements that the Council is making to the Customer Journey**
- (3) Approve the release of £17,000 of new burdens grant received from DWP and DCLG in relation to revenues and benefits and £10,000 of Fraud and Error Reduction grant to procurement of the Self-Serve Module of the Revenues and Benefits system.**

Notes

1 Implications for the Council's Key Priorities, Service Plans and Sustainable Community Strategy

- 1.1 Customer care and the effective use of resources are key priorities for the Council.

2 Background

- 2.1 The Strategy and Resources Committee received a report detailing the current position of the CRM at the meeting of 23 September 2014.

STRATEGY AND RESOURCES

29 SEPTEMBER 2015

- 2.2 Customer Relationship Management software is used to record, track and resolve service requests from residents and stores information about the Customer and the Property.
- 2.3 The aim of the project was to deliver improvements in customer services and service efficiency savings.
- 2.4 New software based on Microsoft Dynamics was implemented in September 2014, following a competitive process, Optevia Ltd was appointed to work in with the Council.
- 2.5 Following the launch of the new CRM an open day was held in December 2014, by Customer Services to which all Councillors and Staff were invited, which was very well attended.

3 Current Position

- 3.1 The new system has been live since 13 August 2014.
- 3.2 The CRM currently has fifty entities now live. An “entity” is an activity dealt with by Customer Services: for example a special refuse collection or a building control inspection.
- 3.3 From going live to 12 August 2015, Customer Services has created 68,713 events, processed 8,074 emails and 7,722 eforms, sent 3,538 text messages and handle 12,908 subscriptions on the system. All of these have been entered into the CRM system ensuring that the Agents have a single view of the Customer.
- 3.4 The Top Five case areas are as follows:

• Council Tax Billing or Recovery	8243
• Call Back (Customer requesting to be contacted)	7401
• Garden Waste Subscription	6601
• Missed Container	7071
• Container Delivery	7463
- 3.5 The benefits obtained from the CRM include:
 - 3.5.1 Automatic texting to confirm appointments – reducing waste time and missed appointments
 - 3.5.2 Card Payments – a new card payments system was implemented to enable Customer Services to be able to take payment on a much wider range of services. The previous card payment system was no longer being supported by the third party and changing this improved the Council’s Payment Card Industry Data Security Standard (PCI DSS)

STRATEGY AND RESOURCES

29 SEPTEMBER 2015

- 3.5.3 A new Fees and Charges database was created to ensure that the Customer was always paying the correct amount. This is linked to the CRM and maintained by Finance.
- 3.5.4 Mapping: A new mapping system was implemented to enable Customer Services to be able to locate issues quicker and pass this information to the back office for quicker resolution of calls.
- 3.5.5 A number of disparate and disconnected information stores were joined together and simplified. For example Waste routes and rounds connected to Property data and the customer, Garden Waste Subscription spreadsheets.
- 3.5.6 From 1 October 2014 Customer Services started the management of the Garden Waste service. This has been created as a subscription in the CRM which is therefore able to manage the renewal and letters to Customers.
- 3.5.7 Online parking appeals: whilst slightly outside the CRM this has been an important development as now Customers can go online to start the appeals process against a parking ticket, with information presented directly from the parking system including photographic evidence. This is ensuring transparency with information and gives the Customer all the information that they need and may prevent the process continuing and reducing officer time.

4 Internal Audit Post Implementation Review

- 4.1 As part of the audit annual plan, a post implementation review of CRM was completed. It identified a number of issues and concluded that the CRM has not delivered all the intended business benefits and there are some processes that require parallel systems or CRM process' workarounds in order for the teams to conduct everyday business activities.
- 4.2 The main issues have affected the speed of the system and the security settings. They recommended that the system be stabilised, a project team be established, all processes mapped, the audit trail turned on, some workflows removed and on-going support arrangement agreed.
- 4.3 A number of short term remedial items are being commissioned to address the audit points to ensure better stability and usability of the CRM system, following the review and having used the system now for a year. These are as follows:
- Payments integration – to be rewritten to improve performance and usability for the Agents. This will also work towards improving the Councils security as part of the work on Payment Card Industry Data Security Standard (PCI DSS) security.
 - Eforms integration – to be rewritten to improve performance and usability for the Agents

STRATEGY AND RESOURCES

29 SEPTEMBER 2015

- Email process – currently time-consuming so will be reviewed to meet requirements
- Audit – ensure required areas of system are audited
- Speed – work to increase performance
- Permissions – review to fix some issues.
- Synchronisation of TEST and LIVE Infrastructure – to ensure the same software on both

5 Medium Term Plan

- 5.1 A formal CRM Project Board has been set up to manage the ongoing implementation of system and changes – this is chaired by Director of Finance and Resources. This will manage and review the developments, single issues log and changes across the system.
- 5.2 Director of Finance and Resources has created a more formal approach and consistent methodology for business process re-engineering across the council which will help improve efficiency maximise the use of the CRM, ICT and support cultural change.
- 5.3 To ensure that the Council is able to progress with the remedial work a development freeze has been in place for several months, where no changes have taken place to the system. There have been a number of staffing changes in ICT and Customer Services that have resulted in vacant posts, which have currently not been filled, therefore the future development will need to be reviewed and planned accordingly.

6 Developments Impacting the CRM

- 6.1 There are a number of Council wide developments taking place over the next 6 to 12 months that will have an impact on the customer journey. The Project Team will ensure that all areas are co-ordinated so that the Customer journey continues to improve.
- 6.2 Closure of the Cash Office – the Council is reviewing processes and options for payments including the use of Chip and Pin.
- 6.3 Wi-Fi – the Council is in the processes of installing Wi-Fi at the Town Hall, The Playhouse, Ebbisham Centre, The Wells Centre, Longmead Centre and Ewell Court House to allow free access to Residents.
- 6.4 With approximately 25% of the traffic on the Council's website coming from mobile devices, having Wi-Fi at Venues will enable the Council to engage more proactively with them.

STRATEGY AND RESOURCES

29 SEPTEMBER 2015

- 6.5 Agendas and Minutes – the Council is implementing the Mod Gov Agendas and Minutes system which includes a new element for the website for better engagement with Residents on democratic matters. The new element will provide the ability to subscribe to alerts and find Agendas and Minutes more efficiently.
- 6.6 There is a newer version of the CRM, (MS CRM 2015), that the Council is investigating further. There are options for the upgrade path which will need to be considered by the Project Team.
- 6.7 There are a range of further processes that could be included within the CRM subject to the upgrade path. Where possible and practical the Council will continue to progress.
- 6.8 Expansion of the subscriptions model into other areas including: nappies; pull-out; meals on wheels and trade waste.
- 6.9 The allotments processes to be incorporated into the CRM and the old system removed from operation
- 6.10 Route Call excursions to be incorporated into the CRM to enable Customer Services to manage the bookings more efficiently – subject to Committee Service Review.
- 6.11 To review the Freedom of Information (FOI) process and incorporate into the CRM to provide greater visibility for the FOIs and manage the process more efficiently.
- 6.12 Expand the use of texting to other processes in the Council.
- 6.13 The information being obtained through the CRM will enable cross selling of other Council services – such as Garden Waste,

7 Website

- 7.1 Director of Finance and Resources has set up Project Board and Reference Group for the website to manage the requirements and project.
- 7.2 In order to ensure that our Customers have a consistent journey no matter what access channel they contact the Council in it is important that the Website is reviewed to match the expectations of our Customers.
- 7.3 It is important that the Website works well on a range of mobile devices.
- 7.4 To help inform the specification required for the new website a consultation exercise has been undertaken to identify the requirements of residents and councillors. As part of the consultation exercise, consultees were asked to consider providing further assistance in testing the website as the project develops.
- 7.5 A number of solutions are currently being explored including the use of open source software in line with our current ICT strategy and building upon the work of other Councils.

STRATEGY AND RESOURCES

29 SEPTEMBER 2015

- 7.6 The website and eforms need to integrate with the CRM system as needed and appropriate.
- 7.7 Where possible information will be fed directly to back office systems to ensure that manual rekeying is kept to a minimal and the customer experiences a more integrated process. There are a number of current systems online where this happens: Online Planning; eforms; CRM; Housing – online bidding; Licensing; Land Charges; payments; Parking appeals.
- 7.8 There are two key areas that the Project team are looking to ensure that there is a more joined up and streamlined process as part of the new website.
- 7.8.1 Online accounts module for Council Tax and Benefits to facilitate self-serve
- 7.8.2 Online Booking – this could include sports pitches, rooms, events and so on
- 7.9 The online module for Revenues and Benefits will enable residents to access their Council Tax Accounts, Business Rates accounts, Housing Benefit Claims, Council Tax Support accounts, and enable landlords to access their tenants benefit payments where appropriate. The system will also produce electronic bills, adjustment notices, reminders etc for tax and ratepayers and notifications for claimants and landlords. The cost of the software is £35,000 with £3,000 for ongoing support. The ongoing support can be accommodated from within existing budgets.
- 7.10 Funding for the landlord module (£8,000) is already included within this year's budget. The additional funding for this module can be funded from the new burdens grant received from the DWP and DCLG for revenues and benefits (£17,000) and £10,000 from the money received from the DWP for fraud and error reduction in particular for reducing claimant overpayments.
- 7.11 As residents migrate to self service the workload within the Council will reduce resulting in the potential for staff savings. At present it is not possible to calculate this figure accurately however provision of one full time officer has been made within the medium term financial strategy.

8 Financial and Manpower Implications

- 8.1 There is a capital budget of £70k for the website and £30k for the CRM for 2015/16. This has been funded from approved ICT budgets.
- 8.2 **Chief Finance Officer's comments:** The cost of acquiring the Revenues and Benefits module of the CRM can be funded by use of available grant income as identified in this report of £27,000 and existing budget of £8,000.

9 Legal Implications (including implications for matters relating to equality)

- 9.1 **Monitoring Officer's comments:** No comments for the purposes of this report.

STRATEGY AND RESOURCES
29 SEPTEMBER 2015

10 Sustainability Policy and Community Safety Implications

10.1 None

11 Partnerships

11.1 The Head of ICT is a shared post with Elmbridge Borough Council.

12 Risk Assessment

12.1 Resources and focus now need to be deployed and sustained to ensure that the potential benefits are delivered in full.

13 Conclusion and Recommendations

13.1 The programme of work for the development of the CRM and Website is being managed through the Project Teams reporting to Leadership Group to ensure that progress continues to be made.

WARD(S) AFFECTED: ALL