

WIRRAL COUNCIL

TRANSFORMATION & RESOURCES POLICY & PERFORMANCE COMMITTEE

21ST SEPTEMBER 2015

SUBJECT:	CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM
WARD/S AFFECTED:	ALL
REPORT OF:	HEAD OF BUSINESS PROCESSES
RESPONSIBLE PORTFOLIO HOLDER:	COUNCILLOR ADRIAN JONES
KEY DECISION?	NO

1.0 EXECUTIVE SUMMARY

- 1.1 At the work programme session on the 4th August 2015, Members requested a report on the Customer Relationship Management system (CRM).

This report seeks to inform Members about the journey the Council has taken so far with its current CRM system and the future plans it has for its replacement and the key role it will play in helping the Council to achieve its 2020 Vision: Taking Wirral Forward.

2.0 BACKGROUND AND KEY ISSUES

2.1 Background

In 2005 Wirral Council began using the current Oracle Customer Relationship Management system in the Call Centre and One Stop Shops to capture customer and councillor contact relating specifically to Streetscene services. It also became the main back office business system for the division formerly known as Highway and Engineering Services, which later became Environment and Regulation.

Following successful implementation for Streetscene services CRM went on to become the main business system for Complaints, Compliments, Freedom of Information and Pest Control plus capturing customer contact for Building Control and Planning, some Children's Services and Anti Social Behaviour.

The CRM is also used by our partners; Biffa Waste Services, BAM Nuttall and Lairdsid Communities Together (LCT) to receive and complete work instructions relating to reports or requests submitted by customers, councillors, MP's and officers within Wirral Council.

In 2005 the CRM only captured the customer name and details relating to an issue reported but over the last 10 years it has been further developed taking advantage of functionality such task workflow (automation of business processes), automated scheduling, integration, mobile working, performance monitoring and customer self-service via the web.

2.2 CRM Go live

The Oracle E-Business system went live with the Customer Relationship Management system (CRM) in July 2005.

20 Streetscene services were amongst the first set of services chosen during phase 1 that the Council would begin capturing customer contact for.

Staff within our Call Centre and One Stop Shops (OSS) captured the details from a customer relating to a Streetscene service and entered those details against a specific service request in CRM.

Reported issues entered into the CRM were printed out onto job tickets and given each morning to inspectors to visit and assess. For the defects that required repair a works instruction form was written out and handed back into the office at the end of the day.

The works instruction details were manually entered into the highway job costing system (ROCC Aramis Work Tickets) and printed out each day by the contractor. Following completion the contractor would update ROCC with costing details which would then be subsequently costed and paid for by the Highway Maintenance division.

Improvements:

- Single system to record customer contact relating to Streetscene services that gave visibility of all communication between staff and customers.
- Structured questions for each service capturing the right information at the right time
- Standardised approach to the way reports and requests were made across Streetscene services.
- Ceased using legacy Streetscene customer contact system.

2.3 Field Service and Install Base

This Oracle module replaced the old highway job costing system (ROCC Aramis Work Tickets) for issuing “job tickets” for both reactive and planned highway maintenance work in the former Technical Services Department. This meant that all tasks, from site inspection through to the contractor working on site, were held in CRM and visible to Call Centre/OSS and back office staff to respond to enquirers.

All work included estimated and actual costs for each job. Field Service extended the value of the CRM system to the “back-office” giving work planning and scheduling capability to operational teams using a “diary plan board” that enabled staff to monitor and progress work effectively.

Following the successful implementation work began to roll this out to other services.

Improvements:

- Ceased using 2 legacy systems - ROCC Aramis and MVM.
- Savings achieved in administration efficiencies and licence costs.
- Increased productivity – inspectors were able to carry out drainage inspections.
- Service levels improved, ERIC collections went from 67% to 98%
- Single system across client and contractor, keeping management, staff and customers informed for all services relating to Streetscene.
- Improved management information leading to better informed decisions and improved service levels.
- Increased data integrity.

During this phase Install Base went live. This module allows officers to record and monitor issues raised against highway sign assets.

2.4 Advanced Scheduler

The functionality introduced as part of this phase, Advanced Scheduler, provides state of the art comprehensive scheduling functionality for assigning activities to resources such as members of staff. This predominately worked by assigning tasks to inspectors within highways.

Two methods of scheduling were introduced, both of which were based on pre-defined constraints: Autonomous Scheduling, and Window-to-Promise (W2P).

Autonomous Scheduling was the most efficient and cost effective method of scheduling tasks. No manual intervention was required – a concurrent program periodically runs in the background, and picks up those tasks eligible for autonomous scheduling, and using the pre-defined constraints and available resources, schedules the task in the most cost-effective fashion. The result is a diary plan board pre-populated with tasks for each resource, which can be optimised manually by a manager (including re-assigning tasks) and then 'Committed' to the various resources to work on.

The Window-to-Promise scheduling option addresses a situation where the customer wants the option to dictate the date and time of a visit. The Window-to-Promise is specifically designed to provide the customer with just such a date and time slot. A time slot is the period in which a service representative/team visits the customer to perform a service task.

Improvements:

- Further administrative efficiencies gained both in the Call Centre, Environmental Services and Biffa Waste Management.
- Increased productivity - more inspections being carried out per day.
- Functionality rolled out to Pest Control, savings made around efficiencies and licence costs.
- Automated work scheduling optimised job allocation which improved Service Level Agreements.

2.5 Mobile Working and Microsoft Word integration

Oracle Mobile was part of the Oracle Field Service suite of products and went live in 2007. The application enabled an inspector to respond to a reported defect in a fully automated and computer-efficient way using a mobile device. This allowed tasks to be received and dealt with in a timely manner and service requests resolved quickly.

Tasks to inspect issues could be received and work to repair the defects could be raised using hand-held mobile devices. Inspectors no longer had to visit the office to collect their work or drop off work required for the contractor to do.

Improvements:

- Savings gained through less duplication, paper and travelling costs.
- Service levels improved, reduction in delays.
- Number of inspections carried out increased as inspectors were not having to return to the office during the day.

Unfortunately changes to the contractors pricing structure along with the age of the mobile devices led to the inspectors working remotely using laptops instead. However trials have been carried out recently using new mobile technology that should enable our inspectors to start using mobile devices again.

During this phase the council also went live with CRM/Word integration.

Improvements:

- Saved staff having to manually enter customer and service details each time correspondence relating to a service request was processed
- Customer correspondence held in one place

2.6 Integration with Biffa's own Management Information System

With the introduction of mobile working came the "integration hub". This gave the council the functionality to be able to integrate with the councils waste contractor management information system, Biffa Springboard.

Reports from customers relating to missed bin collections were input into CRM and automatically routed to Biffa's waste collection vehicle. By Biffa receiving this information direct they are able to respond, collect the missed bin and update the system accordingly as soon as the bin has been collected. This system was later rolled out to services relating to the supply of waste and recycling bins.

Improvements:

- Quicker response times;
- Improved service levels;
- Improved customer information;

- Improved customer satisfaction;
- Savings made by Biffa Waste Services;
- Saving of £75,000 per year relating to the supply of waste bins;
- Reduction in duplication, errors and improved data integrity.

2.7 Email centre

Email Centre is a module within the Oracle eBusiness Suite that provides:

- Provided full visibility of all emails in/out of selected council email addresses.
- Full visibility of email management and allocation.
- A tool that helps to manage email communication with Customers.
- Automated inbound email processing.
- Outbound customer emails and responses.
- The ability to efficiently handle email in a consistent and accessible email data store.
- Classification that allowed priority emails to be dealt with first.

2.8 Web including integrated eforms and text messaging

Over the years demand and expectation for council services has increased with customers expecting to contact the council at a time that suits them.

With this in mind the Council evaluated its customer contact and updated its Customer Access Strategy detailing the changes required that would enable those customers who wanted to, to self-serve at a time that was convenient for them whilst at the same time achieve the savings associated with customers self-serving.

Electronic forms were created and published on the council's website that integrated directly into the CRM system. Each time a customer reports or requests a service via an integrated CRM eform the details are automatically fed into CRM.

These changes allow customers to interact with Wirral Council 24/7, 365 days of the year. Customers no longer have to wait until office hours following a Bank Holiday to report their missed bin collection. By going online and reporting it themselves customers can be assured their bin will be collected by the contractor without having to wait and speak to a member of staff within the council.

A pothole reported on a Saturday evening is automatically scheduled for inspection as soon as it enters the system using the systems built in resource scheduler. Once scheduled an automatic email is sent to the customer confirming the timeframe the inspection will take place in. Customers are able to join and pay for the garden waste collection service via the web, the details are fed into the CRM and automatically sent to Biffa instructing them to add the property to their round.

More recent improvements to the CRM are allowing customers to track progress via the Wirral website of not only their own reported issues or requests but reports made by other customers. This again not only keeps our customers informed but allows us to target the resources available towards supporting those customers who are not able to get online themselves.

For the services that do not go through CRM a software package called AchieveForms has been used. AchieveForms has allowed the council to further extend the number of eforms available via the web. Information submitted via these forms is sent directly to the each service in the back office.

Improvements:

- **Simple to use** – no need to remember different telephone numbers or email addresses, eforms are streamlined and simple to use
- **Accountability** - a reference number confirming we have received the request is given along with an indication of when the request will be dealt with. Each task generated has a service level agreement and managers can at any time view outstanding tasks and performance against SLAs. There is a clear audit trail within the system allowing managers to identify who has been involved in the process at every stage.
- **Track progress** – the reference number can be used to track progress via the web, reducing unnecessary contact via the telephone relating to progress chasing.
- **Kept updated** - system automatically sends email updates about the Streetscene request
- **Convenient** – our web is available 24/7 therefore reports made via the web get actioned as soon as they reach the system. This means bins can be reported and emptied during Bank Holidays and reported defects can be scheduled for inspection automatically by the system during the weekend instead of having to wait until Monday when our staff are available to process the report.
- **Cost effective** - for the majority of services the information entered using an eform on the web is automatically entered into our CRM system at a substantially lower cost to the Council than had it been entered via traditional contact channels such as telephone, email or face to face.
- **Streamlined** - for those services that don't directly integrate with the CRM system, the eform ensures that the correct information is captured enabling it to be logged correctly into the CRM. (Often with emails we needed to contact the sender to find out more information).
- **Resourcing** – using the information captured we can monitor progress and volumes easily, which allows us to allocate resources more effectively.
- **Duplication** - updates provided direct to customers and councillors are displayed via the internet thus avoiding duplicate reports.

The Council's web has also been improved over the last couple of years giving customers better information about the services it provides plus

functionality that allows customers to easily find information out, such as “when will my bin be collected?” or “what time is the next keep fit class on?”. The Council’s website will become even more accessible to our customers after September following an upgrade that will see the Councils website becoming leaner, faster, easier to navigate around and easier to access using any device e.g. PC, laptop, smartphone or tablet.

Appendix A details the Streetscene services that can be accessed via the Councils web site using an eform.

Appendix B details the number of reports or requests made since the Councils first eform went live on the web.

To further improve the customers experience text messaging was introduced to the Bulky Item Collection service (ERIC). Customers now receive a text message about their collection the day before their collection is due reminding them to put their items out.

2.9 Future development

We continue to receive and act upon feedback, improving the system and eforms where we can.

The CRM system is now 10 years old and although it has helped the Council to achieve savings and make services more accessible than ever it lacks the technology that supports the Council’s vision going forward.

The Council’s 2020 Vision: Taking Wirral Forward promises to be a Council which is fit for the digital world. Our services must be accessible, delivered sometimes entirely online to help reduce costs and remove duplication, to improve speed and efficiency.

The Council will transform how it works with residents; driving integration and being as efficient as possible, with one point of contact able to solve every residents need. We will become a Council that is digital by default.

As pointed out by the Cabinet office in November 2012; by digital by default requires digital services that are so straight forward and convenient that all those who can use them will choose to do so whilst those who can’t are not excluded.

Over the coming months the Council will begin work to replace its current CRM system. Our new system will be fit for purpose and adaptable in order to respond to the ever changing advances in technology. It will place Wirral in an excellent position as a Council going forward with partners and the community one which is responsive to customer contact in the most efficient manner. It will be developed to enable it to be the ‘front door’ for our public, private and community sector partners if required to provide joined up response to Wirral residents.

It will be developed via thorough consultation with our users including Members to ensure it meets the needs and expectations of those people who deal with customer contact on a regular basis via focus groups. We will also speak with customers to ensure that the system meets their needs too.

Key deliverables:

- An online customer account with an autofill facility which saves customers having to enter common details each time they report or request a service. Customers able to update personal information themselves.
- All customer contact held in one place.
- Integrated tracking facility which allows customers to track progress for reports or requests made until resolution.
- Integrated payment/refund functionality enabling customers to pay for services or request refunds via the website.
- Integrated booking facility that will enable most bookings/appointments to be made via the website
- Integrated mapping that helps when reporting street location issues
- Integrated signposting to information provided via the website
- Integrated document management store
- A “sign up” facility that will keep customers informed of council news
- Single delivery system across all delivery channels used by customer service advisors, reducing training and improving support for customers
- System that is self-sufficient in adding or adapting processes to support new or modified services into the future.
- Improved business intelligence which will help the Council make better informed decisions
- Workflow to automate processes and assign tasks automatically
- Integration with key back office systems to provide a joined-up customer experience

Key principles:

- Design services around our customers, working closely with our partners
- Our website will be the primary channel for delivering Council services for customers and staff.
- Our customers will know what is happening at each stage of the process
- Our online services will be easy to find and use, effective, efficient and secure.
- Customer feedback will be easily captured and used to inform service improvements
- Wirral residents and staff will have the necessary access, confidence, skills and support to enable them to interact with us online
- Emails and SMS will be used to proactively reduce avoidable contact
- The telephone service will support our web offering for those people who need assistance in accessing our services, and for those enquiries that are too complex to transact online.

3.0 RELEVANT RISKS

3.1 The relevant risks associated with not taking this approach are:

- If we do not support people to go online it will cost the Council more and we will fall behind other councils and the way they interact with customers.
- Our customer contact strategy becomes outdated with current customer expectations.
- We are not in line with central government thinking.
- By not making self-serve channels available we risk isolating the more vulnerable that need our limited resources for mediated support.
- By not moving forward we become a council that lacks the digital capacity to interact with modern society resulting in higher council tax charges for Wirral residents due to the Council supporting obsolete ways of working.
- The Council does not achieve the budget cuts required over the next 5 years.

4.0 OTHER OPTIONS CONSIDERED

4.1 Remain with the current CRM system.

Current system will become unsupported and obsolete; lacking the technology it requires to interact with other systems and customers.

This option is therefore not viable.

5.0 CONSULTATION

5.1 The Council consulted during the What Really Matters consultation in 2013. An agreed budget option was Improving Access to the Council via call centre savings and improving online access for customers.

Full Equality Impact Assessments were undertaken for those budget options.

6.0 IMPLICATIONS FOR VOLUNTARY, COMMUNITY AND FAITH GROUPS

6.1 By making our services available online we ensure our services are available 24/7, 365 days of the year which enables volunteer, community and faith groups to interact with the Council at a time and a place that suits them and the people they help.

7.0 RESOURCE IMPLICATIONS: FINANCIAL; IT; STAFFING; AND ASSETS

7.1 Financial savings have been achieved by maximising the use of the web and will continue to be maximised using this channel.

There has been an overall reduction in staff through remodelling.

Although there is currently adequate IT in place to support self-serve via the web as it stands work is required to replace the current CRM system in order to

satisfy the increased customer expectations and achieve maximum savings over the next 5 years.

8.0 LEGAL IMPLICATIONS

8.1 There are no legal implications.

9.0 EQUALITIES IMPLICATIONS

9.1 Has the potential impact of your proposal(s) been reviewed with regard to equality?

(a) Yes and impact review can be found by following the link below.

<http://www.wirral.gov.uk/my-services/community-and-living/equality-diversity-cohesion/equality-impact-assessments/eias-april-2014>

10.0 CARBON REDUCTION IMPLICATIONS

10.1 There are no carbon or environmental issues.

11.0 PLANNING AND COMMUNITY SAFETY IMPLICATIONS

11.1 There are no planning and community safety implications.

12.0 RECOMMENDATION

12.1 It is recommended that the report is noted.

13.0 REASON FOR RECOMMENDATION

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APPENDICES

Appendix A Streetscene eforms available via the Council's website
Appendix B Reports/requests made via the web since 2010

REFERENCE MATERIAL

What Really Matters Consultation 2013
2020 Vision: Taking Wirral Forward
Customer Access Strategy

SUBJECT HISTORY (last 3 years)

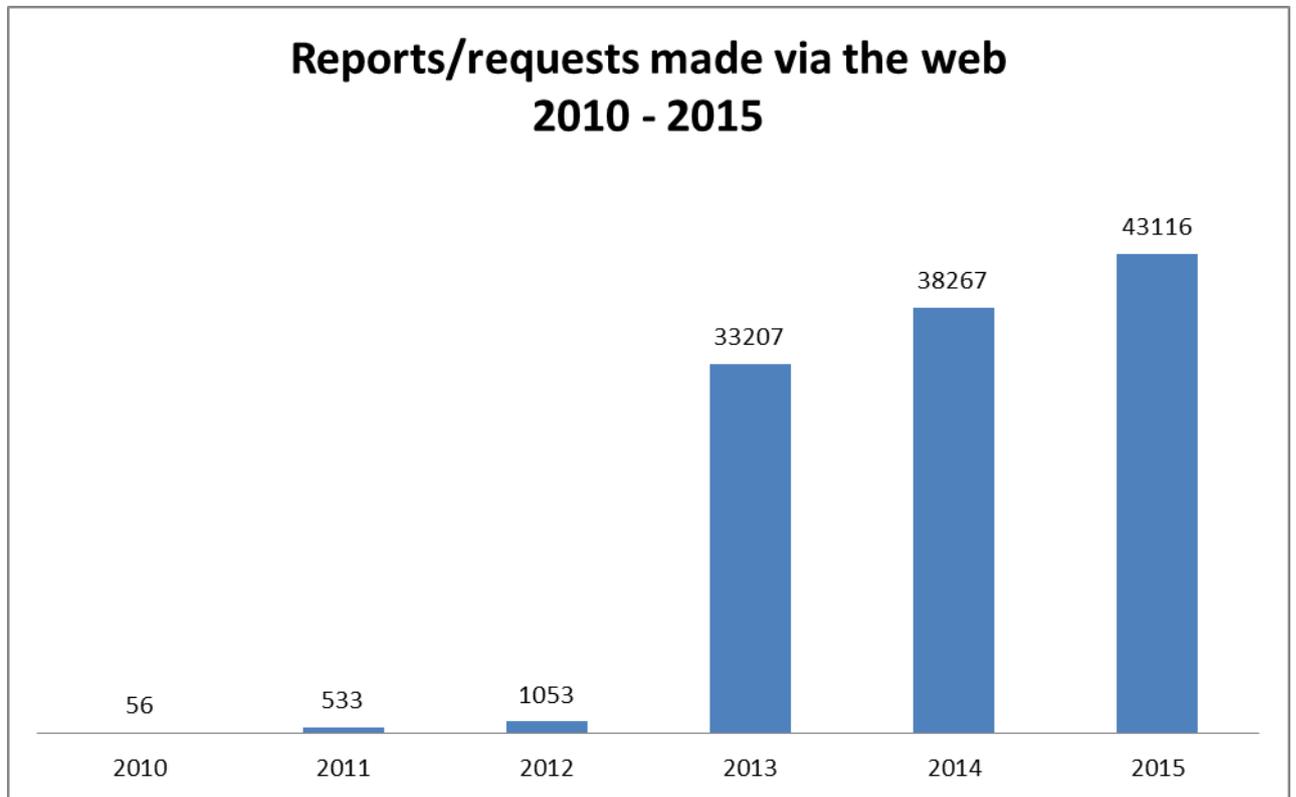
Council Meeting	Date

Appendix A

Access Protection Marking
Allotments
Bollard
Bridges and Structures
Car sale/repair on road
Coastal Protection
Cycling
Dead Animal - Highway/Property
Disabled Parking Bays
Dog Fouling
Flooding
Fly Posting Highways
Fly Tipping
Graffiti
Grounds Maintenance
Gully Defect
Help List Request
Household Waste - Cancel Bin
Household Waste - Remove Bin
Household Waste - Supply Bin
Household Waste - Collection Brown Bin
Household Waste - Collection Bulk Bin
Household Waste - Collection Green Bin
Household Waste - Collection Grey Bin
Household Waste - Garden Waste Collection
Highway Sign
Licensing & Permit Issues
Street Litter Bin
Memorial Bench
Needles and Syringes
Parking Issues
Parking Ticket Appeal
Parks and Countryside
Pavement Defect
Public Rights of Way
Recycling Bank
Recycling General
Resident Parking Permit
Road Adoptions
Road Closure Request
Road Defect
Road Markings
Road Safety
Roadworks

Skip Problem
Street Cleansing
Street Lighting
Street Nameplates
Street Naming/Numbering
Street Seats
Trade Waste
Traffic Conditions
Traffic Signal
Trees General
Trees Inspection
Vehicle Crossing
Visitor Parking Permit
Winter Maintenance

Appendix B



*2013 saw the introduction of the Garden Waste Subscription service