

Report to Resources Overview and Scrutiny Panel

Agenda
Item:

A.4

Meeting Date:	13 th April 2017
Portfolio:	Communities, Health & Wellbeing and Finance, Governance & Resources
Key Decision:	N/A
Within Policy and Budget Framework	N/A
Public / Private	Public
Title:	Smarter Services Delivery Project
Report of:	The Customer Services Manager
Report Number:	CE 03/17

Purpose/Summary:

The purpose of this report is to update the panel on the Smarter Service Delivery (SSD) Project. The project was set up initially to meet customer expectations in being able to access City Council services 24 hours a day, 7 days a week online. Key officers across several service areas developed a transactional website that was optimised for mobile devices. An important part of this was to ensure seamless integration with back office systems. This allowed resources to be used in a more effective way, e.g. they were not downloading information and typing it into spreadsheets.

The new website was written in plain English, although there are certain legislative terms that need to be retained. A portal was devised called “my account”. This allows customers to register and look at various elements of their council tax account such as the balance, their bill and payment methods. They are also able to apply for discounts and exemptions, give details on moving property, set up a direct debit along with various other functions. Customers can sign up to receive their bills by e-mail (e-billing), view their housing benefit application, report environmental problems, access refuse & recycling services, access business rates accounts, submit a green spaces enquiry and submit a planning enquiry. There are plans for other services to be accessed via my account. There are currently over 14,000 sign-ups for my account.

The second phase of Smarter Service Delivery (SSD2) focuses on the installation of a Salesforce platform including the replacement of the Customer Relationship Management

(CRM) system. The original Capita CRM system is used within customer services to capture service requests and information which is fed into back office systems. However, Capita CRM is not fit for purpose. There is only one other local authority in the country which uses Capita CRM and it is no longer developed or enhanced. Customer services have used this system since 2004. The annual maintenance costs of around £70,000 are disproportionately high for the amount of support provided and the size of user base.

After researching replacement systems for Capita CRM and consultation with the Senior Management Team, the SSD board chose the Salesforce Platform as a replacement. Salesforce CRM requires a subscription only and therefore shrinks or grows with the required usage. It is fully Cloud based and constantly developed at no additional cost. The expected annual savings over the current solution are £45,000.

Salesforce recommend using a development partner for the implementation of their platform. Our peers have tended to go down this route and have hired companies like Arcus, often at great expense. Carlisle City Council are developing and configuring the system in-house. This has created interest from other authorities using Salesforce as well as from Salesforce itself.

Rather than replace existing CRM processes, wherever possible the project is seeking to make improvements and reduce administration time for front and back office, while also enabling the transfer of additional service areas to customer services.

In summary, the Salesforce CRM will save the Council money and also assist us in creating efficient and effective service processes. Salesforce CRM is the hub of systems that can be created via the Salesforce platform, e.g. it has already replaced the IT helpdesk software. Again, this allows the Council to retain control of changes and upgrades to the systems.

Stage 1 and stage 2 of the SSD project have both used Salesforce. Customers who report a service request on the website will receive a confirmation e-mail with a reference number. The request will then be fed into Salesforce CRM in the same way that a customer requesting a service over the telephone or face to face would. Therefore, the customer service advisor can access all of the information regarding the customer in one place. This method also gives a more detailed reporting capability.

A roadmap of the service migration from Capita CRM to Salesforce CRM is attached at Appendix A. This may vary slightly dependent on differing priorities arising.

Recommendations:

It is recommended that the Resources Overview and Scrutiny Panel endorse the proposals within this report of supporting further development of Salesforce CRM. This will combine the use of new and emerging digital service delivery to enable efficiencies as well as continue to meet ever changing customer expectations.

Tracking

Executive:	
Overview and Scrutiny:	
Council:	

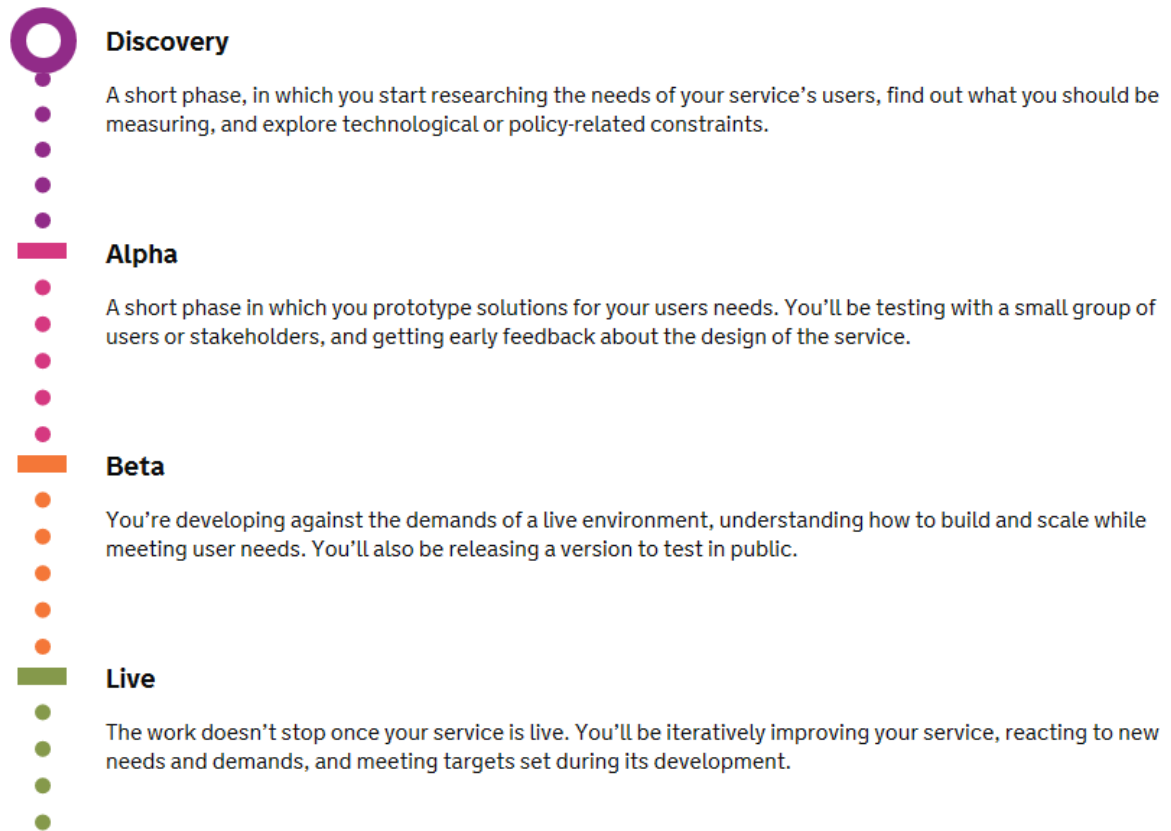
1. BACKGROUND

- 1.1** The original Smarter Service Delivery (SSD) Project focused on the development of a transactional website that was optimised for mobile devices (Mobile first). The goal was to enable customers to self-serve when accessing City Council services.
- 1.2** Priority was based on services which created most public demand and wherever possible, end to end integration with back office systems and the current Capita Customer Relationship Management (CRM) system. A self-service portal was devised which currently has more than 14,000 subscribers.
- 1.3** Following the successful go live in autumn 2015 it was decided to continue the project under the title of SSD2 and move the focus to establishing the new Salesforce CRM platform, redesign and streamline front line and back office processes. A Roadmap was developed timetabling the replacement of the Capita CRM and adding new service requests captured through the CRM by July 2017 (Appendix A).
- 1.4** The annual maintenance costs of the current Capita CRM are around £70,000 and disproportionately high for the functionality of this system, the amount of support and the ongoing development. Whereas, Salesforce CRM requires a subscription only and therefore the costs adapt to the required usage. This system is fully Cloud based and constantly developed at no additional cost. The expected annual savings over the current solution are £45,000.
- 1.5** The implementation will see a period of using the old Capita CRM and the new Salesforce system in parallel until all existing processes have been redeveloped and replaced.

1.6 Service Design Method

1.5.1 An agile approach was used for development and service re-design.

Service design phases:



This means building and testing in small chunks whilst working quickly to deliver improvements to a service. Teams will work out how to best meet the needs of the users. When breaking development into phases the risks are minimised, learning takes place about what works and what doesn't and the processes are iterated throughout.

1.5.2 Business Process Re-Design – Service Transfers

Rather than replace existing CRM processes, wherever possible the project is seeking to make improvements and reduce administration time for front and back office, while also enabling the transfer of additional service areas to Customer Services.

- Green spaces - re-design of allotment procedures have reduced back office administration
- Council tax - reduction in back office administration time with introduction of Auto Indexing function from Salesforce forms.
- Area Maintenance - reduction in back office time to compile fly tipping returns using re-designed processes.

- Environmental Health Service transfer - Environmental Health calls transferred from back office to customer services September 2016.
- Environmental Health - form built in salesforce to allow the transfer.
- Noise Nuisance reporting – process re-design has reduced the number of cases to the back office by 189 compared to the same period last year.

2. PROPOSALS

- 2.1** It is proposed to continue with the transfer of services through redesign and migrate them from the Capita CRM to the Salesforce CRM.
- 2.2** Services not currently captured through the Capita CRM will go through the redesign process and be captured via the Salesforce CRM.
- 2.3** A review plan will be updated to ensure the project objectives have been met.

3. CONSULTATION

- 3.1** Consultation has taken place with the Senior Management Team, the Corporate Programme Board, the Smarter Service Delivery Board and the Portfolio Holder for Communities, Health & Wellbeing.

4. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES

- 4.1** The report contributes to a number of priorities within the Carlisle Plan. It gives a more convenient and unified approach to enable access to Carlisle City Council services will support the priorities across the plan.

Contact Officer: Jillian Gillespie

Ext: 7461

Appendices attached to report: Appendix A – Salesforce Development Roadmap.

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:

- None

CORPORATE IMPLICATIONS/RISKS:

Chief Executive's -

Community Engagement –

Economic Development –

Governance –

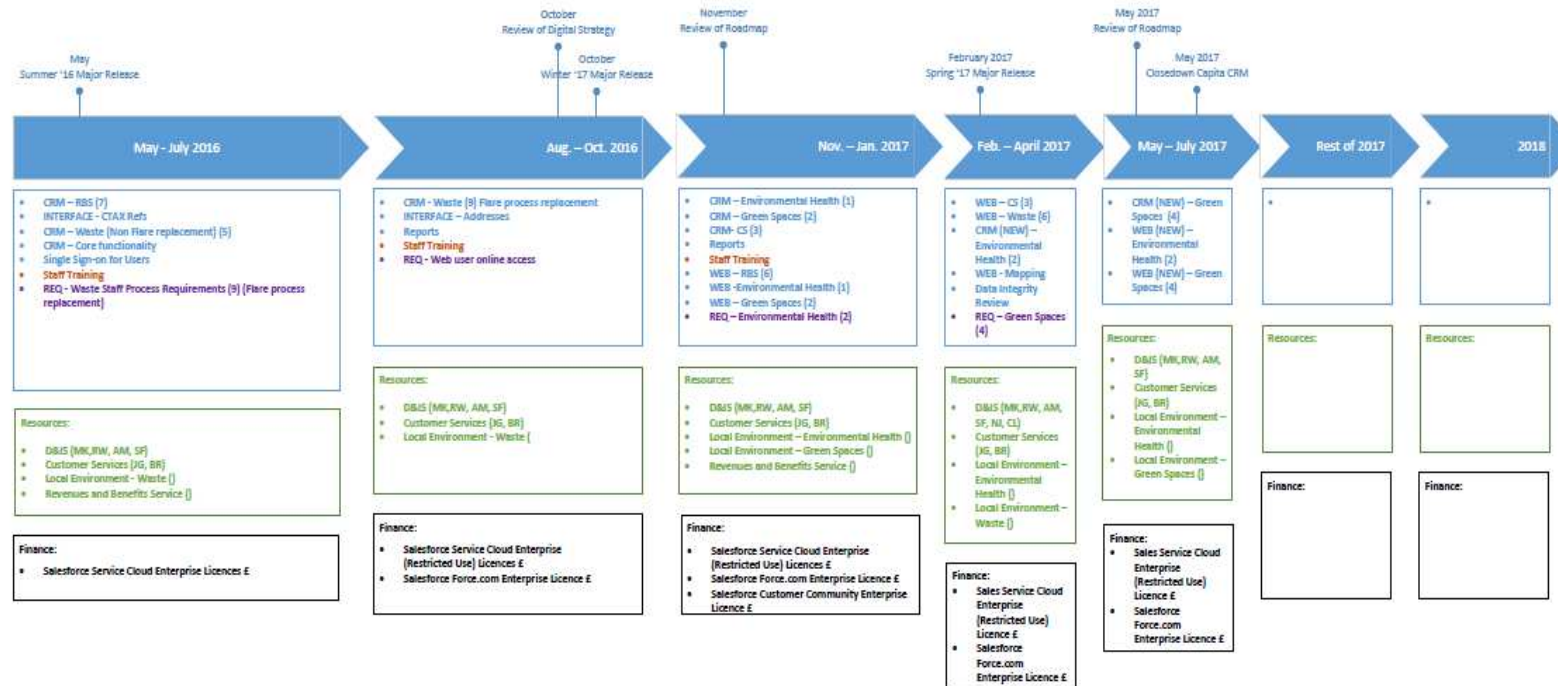
Local Environment –

Resources -

APPENDIX A

Carlisle City Council – Smarter Service Delivery²

Salesforce Development Roadmap 2016 to 2017



Other Digital Strategy and "Business as Usual" projects:

- Financial Ledger application upgrade and cloud hosting.
- Implement e-Purchasing
- Implement intelligent Scanning (Invoices)
- Planning application server build and upgrade.
- Migration to Office 365 - Office 2016 upgrade.
- Migration to Office 365 - Implement One-Drive for Business.
- Migration to Office 365 - Implement SharePoint Online
- British Telecom wide area network migration.
- PSN and PO-DSS compliance.
- Firewall upgrade.
- Upgrade to Payroll and Personnel application
- Revenues and Benefits application upgrades.