

Report to Community Overview and Scrutiny Panel

Agenda
Item:
A.3

Meeting Date: 1st June 2017
 Portfolio: Communities, Health & Wellbeing
 Key Decision: N/A
 Within Policy and Budget Framework: N/A
 Public / Private: Public

Title: Customer Services Update
 Report of: The Customer Services Manager
 Report Number: CE 04/17

Purpose/Summary:

1. Smarter Service Delivery Project

The purpose of this report is to update the panel on the work within customer services and in the main 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.

2. Customer Contact Centre

The customer contact centre face to face function is currently still operating from a temporary portacabin on the Civic Centre car park. Customer services staff have worked exceptionally patiently since the floods of December 2015. However, this building is very quickly becoming unfit for purpose.

The telephony part of the customer contact centre is situated on the 4th floor of the Civic Centre building. Therefore, the two elements of the service are being challenged to operate as efficiently as they could be. That said, the teams are currently meeting those challenges and this shows their true professionalism and enthusiasm for carrying out excellent customer service for residents and visitors within Carlisle.

The Customer Service Advisors are using both the old Capita CRM system and the new Salesforce CRM system to capture customer service requests. This will continue until the old CRM is decommissioned. Full training in the technical use of Salesforce CRM has been very well received. Also the staff have embraced the training they have received during service transfers into the customer contact centre.

3. Partnership Working

Prior to the floods of December 2015, there were several partner organisations working within the ground floor of the Civic Centre. There were also services carried out by customer services staff on behalf of partner organisations. Some of these partners chose not to return to the Civic Centre after the floods. These included HMRC, Adult Social Care, Children's Services, Cumbria Deaf Vision and Citizens Advice Service Surgeries.

However, we do have organisations that have chosen to remain. These include Department of Works and Pensions Fraud Section and Cumbria Constabulary. Her Majesty's Passport Office staff carried out the passport interview service for first time adult passports. Their staff were made redundant after the floods and that service ceased. However, customer services staff negotiated a new contract with them where customer contact centre staff carry out the service on their behalf. This involves remote links to the Glasgow office of the Passport service. This brings additional income into the authority of £50 per interview. Currently this equates to around £7,500 per month. Customer services has been approached by HMPO to extend the service and we are negotiating this part of the contract.

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.

They are further asked to endorse the addition of partnership working opportunities to enable the Civic Centre to become a true community hub for Carlisle.

Tracking

Executive:	
Overview and Scrutiny:	
Council:	

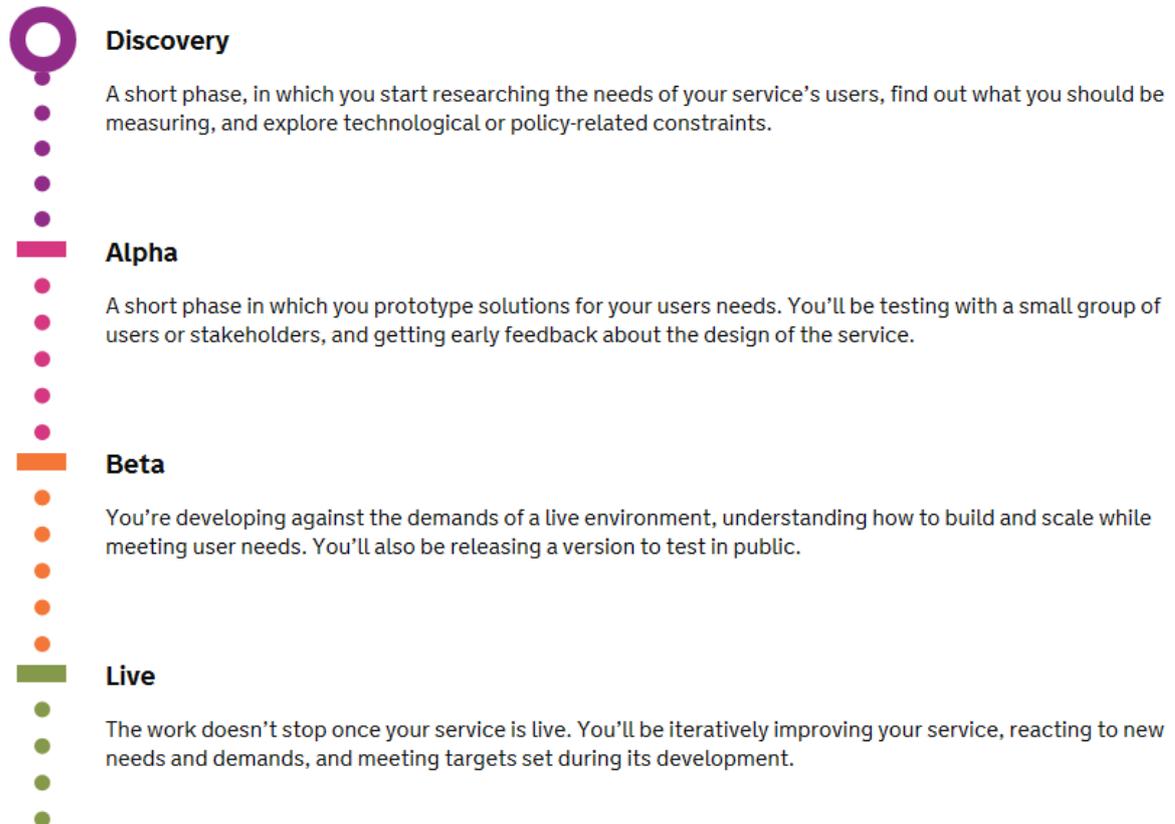
1. BACKGROUND

- 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.
- Green Spaces – online and Salesforce CRM forms live from mid May 2017.

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.
- 2.4** The same technology used online through the website to be used within each contact channel.
- 2.5** Partnership working opportunities to be investigated in time for any permanent customer contact facility to become operational.

3. CONSULTATION

- 3.1** Consultation has taken place with the Senior Management Team, the Corporate Programme Board, the Smarter Service Delivery Board, Resources Overview & Scrutiny Panel 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.

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**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:

Corporate Support and Resources -

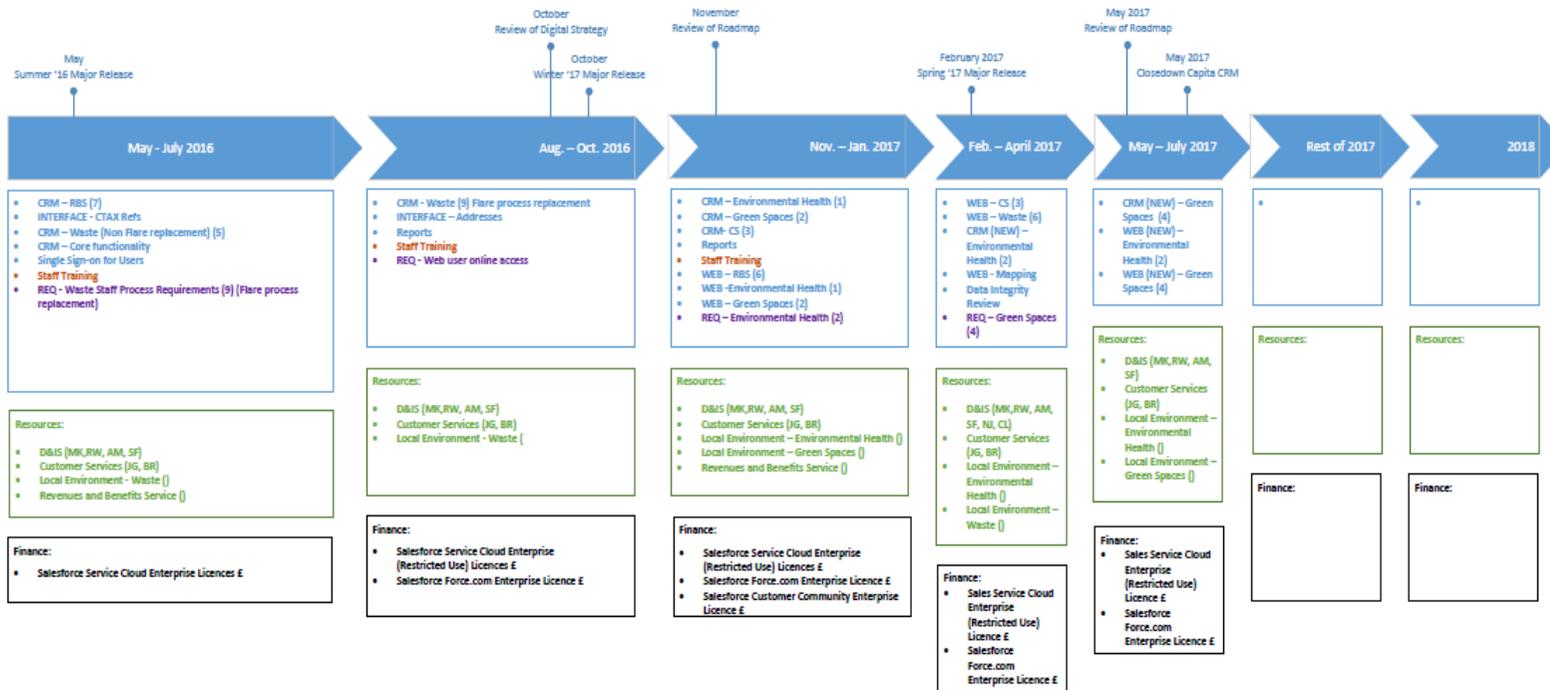
Community Services –

Economic Development –

Governance and Regulatory Services –

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-DIS compliance.
 - Firewall upgrade.
 - Upgrade to Payroll and Personnel application
 - Revenues and Benefits application upgrades.