

# Update of progress on rollout of CRM

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# Ultimate Aim

- That all contact with the customer is logged in the CRM
- That the Council has a single view of the customer
- That regardless of where you live or work you can transact with your Council at the nearest Council offices

# Progress so far



- System has now been live since October 2006
- Now have 66 service requests on the system
- Fully rolled out across Street Scene Services and Freedom of Information

# Progress in relation to partners



- Different Councils moving at different speeds
- We are ahead of the partners
- Are using it to transform the business
- Are realising more benefits

# Roll out plan



- Roll out plan is on target
- Next service is Anti-Social behaviour
- Will then review future services
- LGR will have an impact on the direction

# Efficiency Savings



- Cashable efficiency savings have been identified by using the system
- Streamlined service to the public
- Development of SIS



# Future enhancements



- Joint working through waste permits
- Able to use best practice across the partnership
- Can enhance service delivery and customer experience



# Benefits to Members

- In the future will be able to give ward information on requests for service
- Better info as to types of customer contact
- A better service to the public





# System demonstration



- A quick demonstration of the system.
- Scenario: -  
Telephone call regarding a special collection



# Search for Customer

This will always be a person

Customer  
CDeGP Customer

Clear (B) Create Edit (J)

Type Citizen

Name JOANNE%KELLER%

Address

Town/City

Postal

Phone

Number

Url

Type

E-Mail

- Enter the persons name in the format:

- Joanne%Keller%
- First name%Surname%

–This will bring back any customers that match

Customer Party Name

Find JOANNE%KELLER%

Name	Number	Party Type	Status	Address
Joanne Keller	1052	Citizen	Active	COUNCIL OFFICES, GRE
Joanne Keller	1159058	Citizen	Active	4, CHURCH LANE

# Search for an Address

Customer  
CDeGP Customer Clear (E) Create Edit (J)

Type Citizen

Name

Address 4%church%lane%

Town/City

Postal

Phone

Number

Url

Type

E-Mail

- Enter the address in the address field:

- 4%Church%Lane

First name % Surname %

–This will bring back any addresses that match

Customer Address

Find 4%church%lane%

Address	City	State	Province	Country	Postal Code	Name
4, B6282 CHURCH STREET HIGH ETHERLEY ALONG E...	ETHERLEY GR...	COUN...	BISHOP ...	United Kingdom	DL14 0JZ	B6282 CHU
4, CHURCH LANE	MURTON	DURHAM		United Kingdom	SR7 9RD	CHURCH L
4, CHURCH LANE	FERRYHILL	COUN...	FERRYHI...	United Kingdom	DL17 8LP	CHURCH L
4, CHURCH LANE	FERRYHILL	COUN...	FERRYHI...	United Kingdom	DL17 8LP	Joanne Kell
4, CHURCH LANE	FERRYHILL	COUN...	FERRYHI...	United Kingdom	DL17 8LP	Peter Wilkin
4, CHURCH LANE	DURHAM CITY	DURHAM		United Kingdom	DH1 3HF	CHURCH L
4, CHURCH LANE	DURHAM CITY	DURHAM		United Kingdom	DH1 3HF	Pamela Her
4, CHURCH LANE	DURHAM CITY	DURHAM		United Kingdom	DH1 3HF	Thomas Wil
4, CHURCH LANE	SHADFORTH	DURHAM		United Kingdom	DH6 1NR	CHURCH L
4, CHURCH LANE	SHADFORTH	DURHAM		United Kingdom	DH6 1NR	Sally Clough
4, CHURCH LANE NORTH MURTON	MURTON	DURHAM	SEAHAM	United Kingdom	SR7 9RJ	CHURCH L
40, CHURCH LANE	MURTON	DURHAM		United Kingdom	SR7 9RL	CHURCH L

Find OK Cancel

# Free Collection?



Oracle Applications - DurhamConnects CRM

File Edit View Folder Tools Reports Actions Window Help

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Contact Center

**Contact**

CDeGP Clear Create Edit

First  Last

Number  Relation

Address

Town/City

Post Code

Phone   E-mail

Type

**Customer**

CDeGP Customer Clear (B) Create Edit (J)

Type

Name

Address

Town/City

Postal

Phone

Number

Url

Type

E-Mail

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Dashboard Party Information Relationships Addresses Contact Points Interactions Service Request Notes Custom1

View By  Last Refresh Date **24-SEP-2007 15:15:09** Refresh (K) Critical  View Details (M)

Sedgefield Borough Council		Environmental Services	
Property Open Service Reque:	0	<span style="color: green;">■</span> Low	SE Assist List
Property Closed Service Requ:	121	<span style="color: red;">■</span> High	SE Clinical List
Citizen Open Service Request:	0	<span style="color: green;">■</span> Low	SE Garden Maintenance
Citizen Closed Service Reques:	115	<span style="color: red;">■</span> High	SE Info from Crew
			Charge Sp. Coll (next month)
			Charge Sp. Coll (this month)

# SE – House Waste Special Coll



**Oracle Applications - DurhamConnects CRM**

File Edit View Folder Tools Reports Actions Window Help

Contact Center

**Contact** CDeGP Clear Create Edit

First Last  
Number Relation  
Address  
Town/City  
Post Code  
E-mail  
Phone Type

**Customer** CDeGP Customer Clear (B) Create Edit (J)

Type Citizen  
Name Joanne Keller  
Address 4, CHURCH LANE  
Town/City FERRYHILL  
Postal DL17 8LP  
Phone 01740 651514  
Number 1159058  
Url  
Type Telephone  
E-Mail jkeller@sedgefiel

Dashboard Party Information Relationships Addresses Contact Points Interactions Service Request Notes Custom1

Request Type **SE-House Waste Special Coll** Get Available Dates

Available Dates  
03-OCT-07  
10-OCT-07  
17-OCT-07  
24-OCT-07

Reference No.

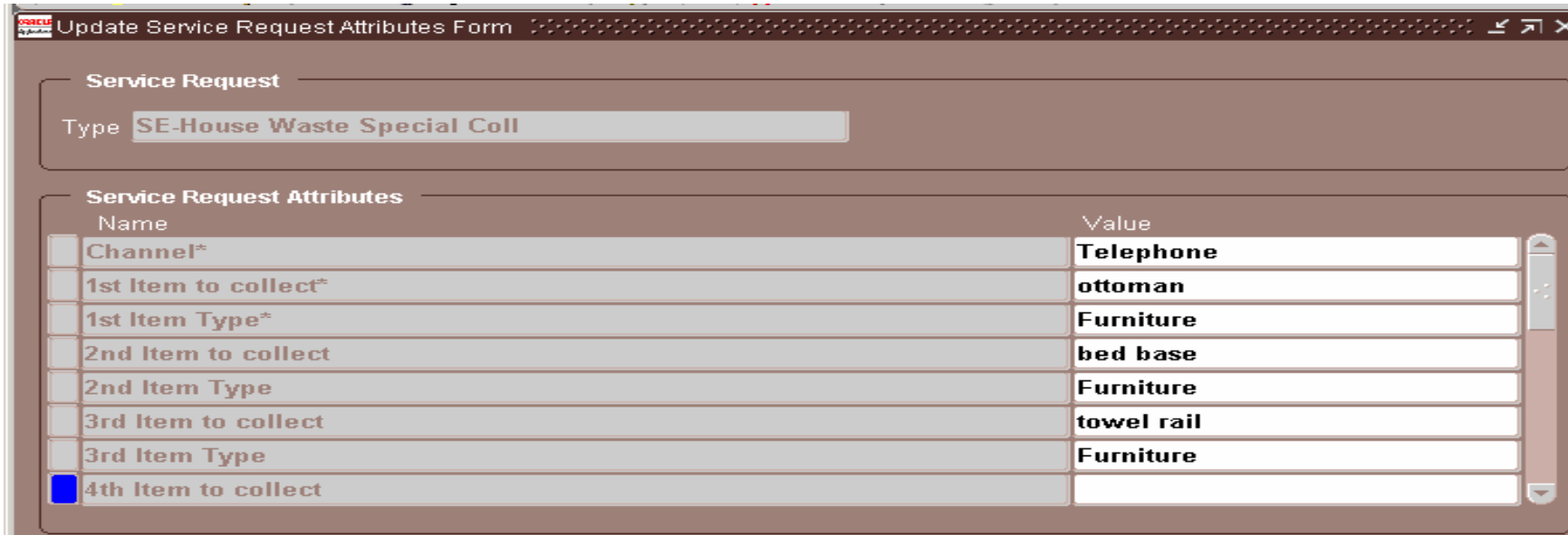
Book Date

**In the 'Available Dates' dropdown a series of dates will be presented. To book a date hit the 'Book Date' button**

**Select SE – House Waste Special Coll then press the 'Get Available Dates' button**

# Add attributes

- Ask and answer all relevant questions:



Name	Value
<input type="checkbox"/> Channel*	Telephone
<input type="checkbox"/> 1st Item to collect*	ottoman
<input type="checkbox"/> 1st Item Type*	Furniture
<input type="checkbox"/> 2nd Item to collect	bed base
<input type="checkbox"/> 2nd Item Type	Furniture
<input type="checkbox"/> 3rd Item to collect	towel rail
<input type="checkbox"/> 3rd Item Type	Furniture
<input checked="" type="checkbox"/> 4th Item to collect	

- A \* indicates that an answer is mandatory.
- Some answers require free text; others have a list of values – Ctrl + L will show you this list. You can also just type the first letter of an answer if you have become familiar with the list of values (e.g. type 'n' to answer 'No').
- Ctrl + E will provide a text pad against the selected answer



# Dashboard



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File Edit View Folder Tools Reports Actions Window Help

Contact Center

**Contact** CDeGP Clear Create Edit

First Last  
Number Relation  
Address  
Town/City  
Post Code  
Phone E-mail Type

**Customer** CDeGP Customer Clear (B) Create Edit (J)

Type Citizen  
Name Joanne Keller  
Address 4, CHURCH LANE  
Town/City FERRYHILL  
Postal DL17 8LP  
Phone 01740 651514  
Number 1159058  
Url  
Type Telephone  
E-Mail jkeller@sedgefiel

Dashboard Party Information Relationships Addresses Contact Points Interactions Service Request Notes Custom1

View By Customer Last Refresh Date 24-SEP-2007 15:15:09 Refresh (K) Critical View Details (M)

Sedgefield Borough Council		Environmental Services	
Property Open Service Reque: 0	Low	SE Assist List	N
Property Closed Service Requ 121	High	SE Clinical List	N
Citizen Open Service Request: 0	Low	SE Garden Maintenance	N
Citizen Closed Service Reques 115	High	SE Info from Crew	N
		Charge Sp. Coll (next month)	N
		Charge Sp. Coll (this month)	N

To view any Historic Service Requests in relation to the Citizen or Property 'Double Click'

# Drill from Dashboard to detail



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File Edit View Folder Tools Reports Actions Window Help

Contact Center

Drilldown List - Property Closed Service Requests

SR Type	Summary	SR Date	
173785	SE-House Was SpeCol	Standard SE-House W	16-APR-07
383350	SE-Ref-Kerbit Box	Created by System	06-SEP-07
399191	SE-Ref-Domestic Bag	Standard SE-Ref-Dom	17-SEP-07
399192	SE-Ref-Domestic Bag	Extra SE-Ref-Domestic	17-SEP-07
284545	SE-House Waste Spec	Collection of 6X DOO	11-JUL-07
284546	SE-House Waste Spec	Collection of 6X DOO	11-JUL-07
139276	SE-House Was SpeCol	Standard SE-House W	07-MAR-07
139586	SE-House Was SpeCol	Standard SE-House W	07-MAR-07
287719	SE-Ref-Bin Del/Rem (E	Standard SE-Ref-Bin C	12-JUL-07
402256	SE-Ref-Domestic Bag	Created by System	18-SEP-07
402257	SE-Ref-Domestic Bag	Extra Created by Syst	18-SEP-07
384204	SE-Highways-Street N	test	07-SEP-07
75877	SE-TelePC MonitorOLI	Collection of , PC Mo	23-OCT-06
74961	SE-House Was SpeCol	Collection of 6 bags	19-OCT
75947	SE-House Was SpeCol	Collection of box Hou	23-OCT

Clear (B) Create Edit (J)

John Keller  
ARCH LANE  
HILL  
LP  
651514  
8

Url  
Type Telephone  
E-Mail jkeller@sedgefiel

Service Request Notes Custom1

Critical  View Details (M)

N  
N  
N  
N

Double click to see the Service Request Detail screen



# Viewing the Service Request Detail



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File Edit View Folder Tools Tools1 Actions Window Help

Service Request (283435) - GMT

**CDeGP Incident**

Customer: Person  
Name: Joanne Keller  
Address: 4, CHURCH LANE  
Town/City: FERRYHILL  
Postal: DL17 8LP

Number: 283435  
Type: SE-House Waste Special  
Reported: 11-JUL-2007 10:23:03  
Status: Input Error  
SLA: Default  
Group: SE-Streetscene  
Owner: Default, Default

Respond by: 18-JUL-2007 00:00  
Resolution by: 18-JUL-2007 00:00

**Note and Knowledge**

Description	Type
----- Decision Manager ----- Decision manager has up...	General Note
Incident Address Address: 4, CHURCH LANE	Service Request
Customer Address Address: 4, CHURCH LANE	Service Request
Channel = Telephone 1st Item to collect = 6X DOORS	Service Request

**Collection Date**

General Note  
----- Decision Manager -----  
Decision manager has updated dates and added collection of 6X DOORS Other  
Decision Manager has changed the status to payment pending

Refresh (B) Delete Outcome New Detail View Log

Details of what to pick up and where to pick up from – Incident Address is where items will be picked up from

**Any Questions?**

