Update of progress on rollout of CRM

Jerry Miller
October 2007

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		Url	
Phone			Type	
Number		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

- Enter the address in the address field:

- 4%Church%Lane

- First name   %   Surname   %

  – This will bring back any addresses that match

Free Collection?

SE – House Waste Special Coll

Sedgefield
BOROUGH COUNCIL

Oracle Applications - DurhamConnects CRM

File Edit View Folder Tools Reports Actions Window Help

Contact Center

Contact
CDeGP   Clear   Create   Edit   [   ]

First
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**   Url
Phone   **01740   651514**   Type   **Telephone**
Number   **1159058**   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   Book Date
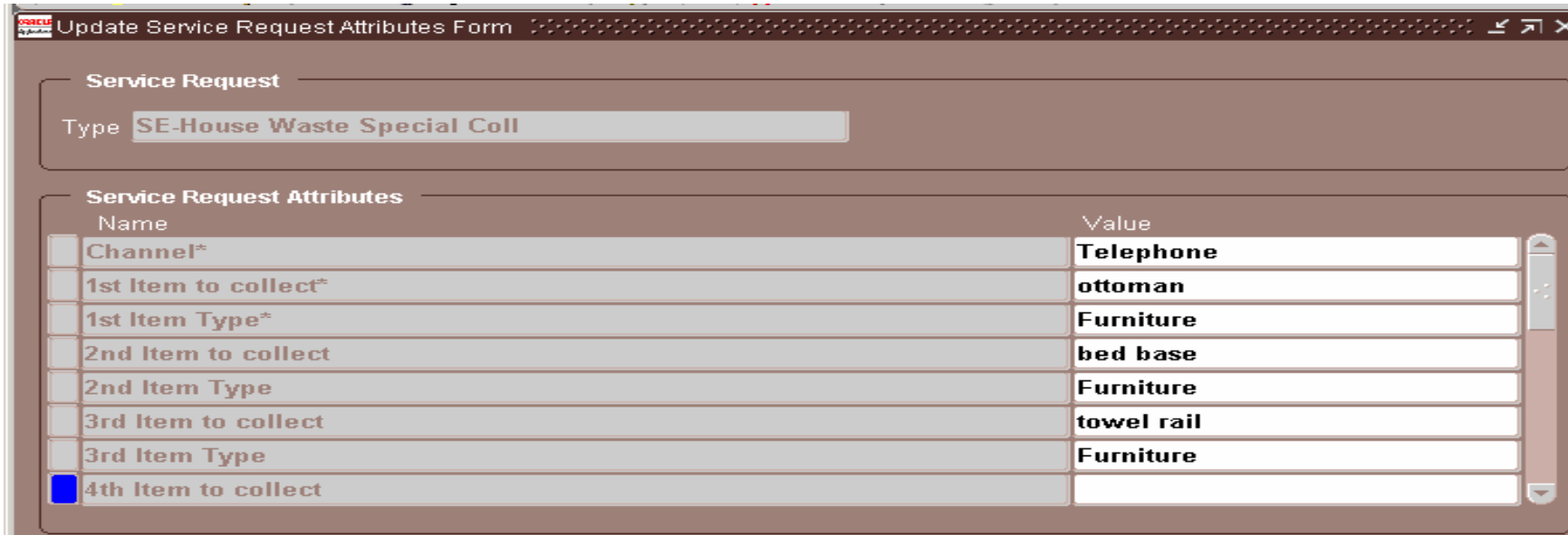   **17-OCT-07**
                 24-O

Reference No.

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:

Update Service Request Attributes Form

Service Request

Type: SE-House Waste Special Coll

Service Request Attributes

Name	Value
Channel*	Telephone
1st Item to collect*	ottoman
1st Item Type*	Furniture
2nd Item to collect	bed base
2nd Item Type	Furniture
3rd Item to collect	towel rail
3rd Item Type	Furniture
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

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

Drill from Dashboard to detail

Viewing the Service Request Detail

Any Questions?