

Item 4

REPORT TO STRATEGIC LEADERSHIP OVERVIEW AND SCRUTINY COMMITTEE

25TH MARCH 2008

REPORT OF THE CHIEF EXECUTIVE

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM (CRM) UPDATE

1. Summary

1.1 This report follows the report to the Overview and Scrutiny Committee 1 on the 29th August 2006 and the report to Strategic Leadership Overview and Scrutiny on the 11th October 2007. It updates the progress of the roll out of the CRM system across the Authority.

2. Recommendation

2.1 That Overview and Scrutiny Committee notes the progress on the roll out of the CRM system and continues to monitor the progress in meeting the Council's customer service modernisation programme.

3. Approach

3.1 In the report of the 11th October 2007 Members will be aware that the CRM system had been rolled out across street scene services and freedom of information.

3.2 Work was on-going with the Council's anti-social behaviour team and the partnership office looking at a rollout of the CRM system across their service by end of January 2008.

3.3 Once this area of work had been concluded a review was to be undertaken as to which services should be targeted next for CRM rollout.

4. Current rollout position

4.1. As at 29th February we now have 67 service requests on the system. This would have been more but 4 service requests had to be removed from the system due to the Housing Partnership with Mears as drainage work is now being dealt with through the Orchard system

4.2 The rollout of the system for the Council's anti-social behaviour is due to go live on the 1st April 2008. The decision to put back the go-live date was operational to avoid the need to enter 10 months of historical data into the CRM to allow for proper reporting of the years figures.

Customer services have recently developed a correspondence Log, Call Back Request, Thank You and Satisfaction Survey service requests and these are being used within the section.

5. Upgrade of the Oracle CRM Software

5.1 The CRM software requires an upgrade and this work has been ongoing since December 2007. This was required as the current version being used will not be supported by Oracle after June 2008 so development has not been possible during this period.

5.2 The New version is due to go live on the 25th March 2008 as the system will need to be down for 2 days. The Easter weekend was identified as the best time to carry out the upgrade whilst affecting the least number of users.

5.3 A full risk assessment has been carried out to identify and manage out any risks highlighted.

5.4 The amount of service requests on a monthly basis are as follows

Sept 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08
4,225	4,916	4,547	2,758	5,298	6,299

6 Improvements in the Service to the Customer

6.1 Work is progressing to fit a system to all refuse vehicles, that will allow the raising, or closing down of service requests from the vehicle. This development will give customer services much faster information when dealing with customer enquiries.

7 Future Development

7.1 A meeting was held on 23rd January 2008 to discuss raising Council Tax and Housing Benefit Service Requests via the CRM and the integration of Anite and RB Live with the CRM. It was agreed that a project plan be written with a view to start the project in April 2008.

7.2 Work has commenced on mapping out the corporate complaints area.

7.3 The development over the next 12 months will slow down as work commences on bringing together the processes for the new Authority but as yet no firm decisions have been made.

7.4 Work is currently being carried out with regards to the Integration of the environmental health system (Flair) with the CRM.

7.5 Work is continuing on the project to use the GIS system for reporting data from the CRM in a graphical format.

7.6 Work is ongoing with regards to address information on the CRM that would enable Business (Trade) requests to be dealt with through the system.

8 Financial Considerations

8.1 None associated with this report

9 Consultation

9.1 This report has been developed through consultation with the CDEGP programme office

10 Other material considerations

10.1 Links to corporate Objectives

10.1.1 The CRM is about improving the service to the customer through electronic means and as such it is key to the Council's stated ambition to make its services accessible.

10.2 Risk management

10.2.1 The CRM is now a business critical system for the Authority and has a fully developed disaster recovery system in place to address any system failures.

10.3 Health and Safety

10.3.1 There are no additional health and Safety implications.

10.4 Legal and Constitutional

10.4.1 No additional Legal and Constitutional issues have been identified

10.5 Equality and Diversity

10.5.1 Equality and Diversity considerations are an inherent part of the CRM. Electronic delivery of services is a key contributing factor to the Council's corporate priority to ensure fair access to services regardless of religion, sex, race, gender etc as set out in the Corporate Plan and Corporate Equality Plan.

11 OVERVIEW AND SCRUTINY IMPLICATIONS

11.1 A further progress report for the period March 2008- Sept 2008 will be submitted to Strategic Leadership Overview And Scrutiny Committee in Sept 2008

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Background Papers:

Customer Services Modernisation Programme (2005)
Report to Overview and Scrutiny Committee 1 29th August 2006
Report to Strategic Leadership OSC Oct 11th 2007