



## **Corporate Overview & Scrutiny**

### **Management Board**

**2 December 2022**

### **Customer Relationship Management System Update**

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## **Report of Paul Darby, Corporate Director of Resources**

### **Electoral division(s) affected:**

Countywide

### **Purpose of the Report**

1. To provide:
  - a. Background and overview of the council's Granicus Customer Relationship Management System (CRM).
  - b. An update on progress achieved in line with the roadmap for short to medium term improvement.
  - c. An overview of findings following a recent systems review to understand the potential benefits, implications and risks that may exist by replacing the current CRM system.

### **Executive summary**

2. The CRM system is a component part that makes up a large proportion of the council's corporate customer service offer. It is the primary system in operation in the corporate contact centre and is the main system that forms the council's online self-service offer with 500,000 service and information requests managed by the CRM across multiple channels each year.
3. Since its implementation in July 2016, the CRM system has continued to expand across the organisation creating self-service opportunities, digitised services, improved customer insight, and the generation of efficiencies in line with the objectives of the Digital Strategy.

4. The CRM system has supported the digitisation of over 130 processes, which generate over 337,000 self-service requests that would have otherwise resulted in an additional 35 FTE at a cost of approximately £740,000 to manage this contact through the traditional telephony channel and face to face channels.
5. The CRM system is well supported and receives positive user satisfaction scores from both customers and internal operators. 85% of customers (based on over 70,000 response) have given the CRM system a 4- or 5-star rating and has now become customers preferred contact channel of choice for simple transactions.
6. Customers also tell us they are satisfied with initial contact through the CRM as part of customer questionnaire. 79% (55% very satisfied and 24% satisfied) are very satisfied or satisfied with the initial contact, based on more than 58,000 responses.
7. However, given the scope of the CRM, the number of integrations with other line of business systems, and the degree of bespoke development to deliver line of business solutions, some performance challenges have been identified during the life of the product.
8. Whilst a proportion of this feedback can be attributed to the CRM or the development activity conducted within the CRM, a significant proportion of issues identified are not system related and the result of operational practices or the limitations of third-party line of business systems
9. Given some of the challenges identified and the rate at which technology moves so rapidly, in 2019 CMT approved a more detailed review and appraisal of technology solutions to explore the business case for the potential replacement of the CRM and website.
10. As the CRM and website were so pivotal in the organisation's response to Covid, it was determined that any re-procurement exercise should be delayed. Contracts for both systems were extended for a period of two years to March 2023 with further extensions available for the CRM system.
11. The extension of these contracts required new roadmaps to be developed to ensure that systems remain operational and compliant, that activities and resource were focused to generate the largest benefits for the organisation. This approach ensured that sufficient capacity was available to conduct a robust discovery project aligned to organisational priorities and changing customer needs and expectations.

12. The current roadmap agreed by CMT in September 2021 focuses on:
  - a. Essential upgrades and maintenance to ensure the systems remain operational and secure.
  - b. Compliance with legislation including GDPR and accessibility.
  - c. High priority development that will provide the greatest benefit to the customer and organisation.
13. Post pandemic progress in line with the roadmap has continued to be delivered while a wider enterprise architecture and application review was undertaken.
14. The applications review concluded that the CRM provides broad compliance with strategic direction and that there is no urgent need to change the CRM platform, particularly given the organisations constraints around finance and capacity.
15. Therefore, the existing CRM contract will be extended on current terms for 2 years in line with relevant contractual clauses and the development roadmap will be updated to ensure alignment with future organisational priorities over this period. Further and detailed business case development will be revisited in line with these timelines.

**Recommendation(s)**

16. Corporate Overview and Scrutiny Management Board are recommended to:
  - a. Note the content of the report
  - b. Note the roadmap and its associated progress that defines the short to medium term improvement of the current Customer Relationship Management System (CRM)
  - c. Note the conclusions of the recent application review and the commitment to extend the current CRM contract in line with relevant contractual clauses and update the development roadmap ensuring alignment with future organisational priorities over this period.

## Background

17. The Customer Relationship Management System (CRM) is the main component part of the council's corporate customer service offer managing almost 500,000 service requests and over 360,000 requests for information each year.
18. The CRM provides customers with the ability to self-serve online for simple transactional service requests and forms a considerable proportion of the council's omni-channel customer management systems architecture, integrating with multiple line of business systems and data sources across the council.
19. The current CRM was implemented in 2016 and replaced the previous Oracle system introduced as a partnership across the two-tier Durham authorities prior to local Government reorganisation in 2009.
20. The original outcomes and deliverables of the CRM implementation programme were:
  - a. Increased customer access to digital transactional services and promote self-service reducing demand through the council's traditional higher costed methods of contact (i.e., email, face to face and telephone).
  - b. Automation and digitisation of processes to reduce duplication, double entry and non-value-added activity performed by back-office services resulting in operational efficiencies.
  - c. Meeting customer expectations and improving customer insight and intelligence by enhancing the knowledge and understanding of our customer's needs, their behaviours and level of satisfaction with services and using this information to actively improve.
  - d. Encouraging and promoting employees as digital advocates and encourage the amount of issue/fault resolution in advance of the customer reporting it; and
  - e. Improving data access and analysis to services to support decision making and service improvement.
21. The platform is a low code, easily configured form and work queue solution which has been enhanced with significant bespoke development to provide key functionality such as booking and support back-office case management and mobile solutions.

22. The CRM currently provides:
- a. The main system in the corporate customer contact centre and Customer Access Points (CAPs), and other contact centres for managing omni channel customer contact including almost 500,000 service requests per year and over 360,000 signposts for information or other services.
  - b. The customer online 'Doitonline' portal with over 269,000 customers generating more than 336,000 self service requests per annum, many of which are delivered to the front line.
  - c. The Members' Portal, an interface to the CRM that gives elected members the ability to raise requests on behalf of residents, track progress of requests and provides data in relation to requests and customer feedback in their area. It also provides links to other member systems and information such as learning and development and agendas, minutes, and papers.
  - d. The main back-office line of business system and mobile solutions for several services including, Clean and Green Service, HWRC permits, Pest Control, Community Hub, and Outbreak control.
  - e. The main customer feedback system for the authority managing council corporate complaints, compliments, and suggestions.
  - f. Fully automated online customer satisfactions surveys, of which over 1000 are received each month for over 100 different service request types.
23. The CRM system also provides a proportion of the Member's portal, enabling councillors to log requests on behalf of residents and linking to other information such as meetings and agendas and learning and development.
24. Use of the Member's portal product is low with the preferred channel being direct to Member support to raise requests on their behalf. Feedback from Members identified further improvement areas including regular, timely and comprehensive updates about cases raised and more detailed outcome or closure information.
25. The CRM has continued to be developed based on Member feedback and several new requirements have been identified which are currently unable to be fulfilled by the current CRM. A full evaluation of the market would need to be undertaken to understand if these requirements could be fulfilled by an alternative system or combination of systems.

## **Feedback and Satisfaction**

26. Transacting online has increased significantly in line with the growth of digital services over recent years. The Covid pandemic accelerated this trend. The percentage of online service requests has increased from 2% in 2016 to 74% across all services to date (for those online services managed by the CRM).
27. During the 12 months ending September 2022 online transactions increased from 65% to 74% compared to the same period in the previous year and many of our transactional services available online are now the preferred method of contact for our customers.
28. Customers (over 70,000 customers in the last 12 months) rate our 'Doitonline' CRM system as very good or good, with 83% giving it a rating of 4 or 5 stars (68% 5 stars, 15% 4 stars) and a further 7.5% giving it a rating of 3 stars.
29. Internally customer service agents also rate the system highly with 93% of employee rating the forms as 5 stars, based on a response rate of 8000.

## **Challenges**

30. Whilst the platform supports integration with other enterprise platforms, the development and maintenance of these integrations can be resource intensive and costly and are in the majority inhibited by the lack of open application programming interfaces (APIs) in the legacy line of business service systems. It is, however, important to note that this is common for most similar systems in the technology market.
31. The system's low code functional capability, ease of configuration, and the previous lack of any other solutions in the council's application architecture has resulted in the system expanding beyond its original remit to become the line of business and mobile solutions for several services.
32. Given the scope of the CRM, the number of integrations, and the degree of bespoke development to deliver line of business solutions, some challenges with performance have been identified during the life of the product.
33. Whilst a proportion of this feedback can be attributed to the CRM or the development activity conducted within the CRM, a significant proportion of issues identified are not system related and the result of operational practices or the limitations of third-party line of business systems

34. In response to challenges and in line with the council's Inspire Transformation Programme, the Digital Customer Board agreed CRM development roadmaps to address short and medium-term functional improvements and customer journey enhancements.
35. These roadmaps have seen the council achieve the following service developments:
  - a. The creation on online forms and process for Licensing including taxi drivers, animal licenses and street furniture.
  - b. The replacement of the historic health and safety system.
  - c. The innovation of mobile FPN issuing with e- learning education.
  - d. Mobile working for the Clean and Green Service.
  - e. LADO process review and online system development.
  - f. AAP funding forms created; and
  - g. Pest control route optimisation.
36. The board also approved a more detailed digital channel review and appraisal of technology solutions which could result in the potential replacement of the system.

## **Ignite Review**

37. In 2019, an independent consultant (Ignite Group) was engaged to carry out a digital channel review. This review concluded the following:
  - a. The durham.gov.uk website has many positives (optimised for search engines, generally well-structured pages, mobile responsive), but consideration should be given to making it more task focused, improving navigation, making calls to action clearer, and clearer presentation of key content.
  - b. 75% of customers rate (the digital forms platform) transactions as excellent or good, with negative feedback focusing on form design, login/registration, poor navigation, and complicated processes; and
  - c. The majority of the council's technology stack is fit for purpose and can be utilised to take Durham forward, but portals and authentication require further analysis and assessment to ensure the best experience for customers.

38. It was therefore proposed that a full review of our digital customer offer be undertaken to ascertain if alternative solution(s) could address some of these issues by providing the council with greater functionality.

## **Covid Response**

39. The planned timeline for the review of the council's digital customer offer was impacted by the pandemic however, the flexibility of the CRM from a complete digital solution perspective was of vital importance to the council during this period.
40. The CRM enabled the response to the COVID-19 crisis in a rapid and agile way, accelerating changes and delivering them in a matter of days and weeks, which would previously have taken months if not years to deliver in normal circumstances and which have been assessed as likely to have cost the organisation an additional £300k to deliver through more traditional contact channels.
41. The CRM was configured to manage many of the response processes required, including the Community hub, Volunteer unit, Outbreak control functions, PPE requests and business grant applications process, as well as many front-end grant forms for businesses and individuals. Over 30 digital processes and solutions were developed in total.
42. Given it would not have been appropriate to proceed with a review and procurement exercise during this time the CRM contract was extended until March 2023, in line with the available contract extension periods contained in the contract. Additionally, a further 2 years of available extensions exist for the CRM system.
43. This extension required new roadmaps to be developed to ensure that the system remained operational and compliant, and that activities and resource were focused to generate the greatest benefits for the organisation.

## **Revised CRM Roadmap**

44. During this period the council looked to wind down its complex development and line of business system integration programme for the CRM but committed to:
  - a. Upgrade the user interface of the customer portal/dointonline account to create an improved customer experience. This was completed in August 2022.

- b. Continue to support the council's overall priorities with new processes, systems, FPOC provision and data presentation as required.
- c. Refresh the council's approach to signposting to better understand and inform changes in relation to overall customer contact. This was carried out in February 2022 and the data is now being analysed to understand how we can improve information provision and reduce avoidable contact.
- d. Continue to deploy 'Case Notes' as a mechanism to record and improve information in relation to avoidable contact and non-value-added activity.
- e. Continue to change forms and processes to ensure legal compliance, for example GDPR and Accessibility (WCAG2.1AA).
- f. Deploy 'Case Viewer' across the organisation in replacement of Dash to improve staff experience, system performance and the productivity of dash. Dash is a work queue within the CRM which is used by service teams to manage cases where there is no integration with specific case management systems.
- g. Continue to develop or integrate priority projects as defined by Cabinet or CMT
- h. Continue to support cyclical activity for business-as-usual activity, for example, garden waste and Christmas tree collections.
- i. Continue to develop simple front-end customer forms which could easily be migrated to new systems or platforms, including the replacement PDF programme.
- j. Review and improve the council's current Member's Portal (hosted by the CRM) in line with the digital democracy roadmap and approach agreed by RMT. This is currently in development and expected to launch in the new year.
- l. Treat and resolve critical or high bugs and fixes where appropriate.
- m. Provide services with an element of continuous improvement where the investment of time and resources can be justified. This will be supported by a process for evaluation.
- n. Continue to provide customers with more opportunities to feedback and demonstrate we are listening by implement improvements where possible to support the council's 'you said, we did' approach which

will continue to be incorporated in the council's customer feedback report

- o. Continue to improve bulk communications marketing opportunities in support of the council's commercial agenda
  - p. A transition to real time data reporting and continue to support the access to, availability, quality, and presentation of data to services; and
  - q. Develop an appropriate transition programme should the future discovery project identify that a transition to a new solution is required.
  - r. A programme of system training for frontline services
45. Furthermore, during the last 12 months the system has flexed and adapted to the changing priorities and needs of the organisation and has also developed.
- a) Selective licensing form and process driving from a new legislative requirement for housing
  - b) A digitised process for planning enforcement
  - c) The creation of multiple services to support Ukrainian refugees including, housing support, advice for refugees and sponsors, in school year admissions.
  - d) Duty to refer – Housing solutions
  - e) Food – Report a problem – Environmental Health
  - f) Record Office Booking form – Resources

### **Member Service Request Review and Trial**

46. In addition to the agreed development roadmaps and in response to feedback and concerns raised by elected members regarding levels of customer service a situational analysis exercise was conducted in October 2021. This activity included the review of available data to support understanding of the current landscape, determine potential root causes and identify opportunities for improvement.
47. This analysis highlighted issues occurring after first point of contact that broadly linked to the following areas.
- a. not keeping customers informed of progress

- b. not explaining our decision making
  - c. taking too long to complete tasks and respond
  - d. not being clear or transparent on when the task will be done
  - e. having to request multiple times
  - f. Incorrect information/advice received upon case closure
48. Following discussions with group leaders in early 2022 a 12-week pilot commenced with six of our Members in April 2022. The pilot aimed to validating the impact and benefits of the trial approach and shape proposals for the longer-term service offer for Members.
49. The pilot required Members within the trial to log all requests for service via Member Services or on a self-serve basis via the Members Portal rather than directly with service-based officers.
50. This approach ensured requests were captured in one place and enabled requests to be tracked and monitored with additional detail sourced from service areas to provide comprehensive updates on progress to Members monthly.
51. The pilot has worked well and has positively impacted Member experience. Member feedback confirms this approach has added value and bridged some of the gaps in service provision previously identified.
52. A further test phase has commenced to assess the impact of Member portal digital enhancements in advance of any wider roll out. This will establish if the increased functionality and enhanced digitisation of processes bridges any further gap for Members in terms of experience as well as reducing the pilot resource burden identified

### **Corporate Enterprise Architecture Review**

53. In January 2022, the Council embarked on a core applications review which predominantly focused on the financial system, payroll system and CRM to understand what benefits could be achieved through a combined system replacement.
54. The applications review concluded that the CRM:
- a. Provides broad compliance with strategic direction
  - b. There is no urgent need to change the CRM environment given the organisations constraints around capacity and the current financial landscape.

- c. There is no major benefit to incorporating it into an ERP solution in the way some suppliers claim.
  - d. Longer term a move to an enterprise level CRM platform that enables better access to data, enterprise level integration and integrated customer service provision end to end is recommended.
  - e. A future assessment of the CRM space could incorporate a view of efficient use of Microsoft licences and the needs of the process and case management areas to provide a comprehensive solution.
55. Whilst the review identified valuable recommendations for future direction of travel, the timeline for development of a business case for the replacement of systems and final proposals related to re-procurement must be considered against the context of the council's current financial and workforce capacity position.
56. Whilst benefits could be achieved through the adoption of a refreshed approach it is acknowledged that current functionality of the CRM systems does meet user requirements in the short term and the timeline for next steps should be carefully considered.
57. Therefore, the existing contract will be extended on current terms for 2 years in line with relevant contractual clauses and the development roadmap will be updated to ensure alignment with future organisational priorities over this period. Further and detailed business case development will be revisited in line with these timelines.

## **Roadmap Timeline and Resource Implications**

58. An update on the current CRM roadmap approved by CMT is outlined at appendix 2 and will be updated and in line with extended contractual timelines.

## **Conclusion**

59. The council previously approved a detailed review and appraisal of technology solutions which could result in the potential replacement of the CRM. This activity was delayed because of the Covid 19 pandemic and wider applications review and the current contract was extended until March 2023.

60. During this period progress against the roadmap continued to be delivered and included:
  - a. The refresh of the design and user interface of the Customer Portal
  - b. The introduction of a 4-tiered system for signposting and general enquiries
  - c. The replacement of multiple PDF's converting them into on-line self-service forms in line with accessibility legislation
  - d. Support to the Ukrainian including housing support, support and advice for refugees and sponsors and in year admissions.
61. The CRM continues to grow and remains well supported by customers.
62. The conclusion of the Application Review determined that the CRM was compliant with the Council's strategic direction the authority and there is no urgent need to change the CRM environment given the organisations constraints around capacity and the current financial landscape.
63. Whilst the review identified valuable recommendations for future direction of travel, the timeline for development of a business case for the replacement of systems and final proposals related to re-procurement must be considered against the context of the council's current financial and workforce capacity position.
64. Whilst benefits could be achieved through the adoption of a refreshed approach it is acknowledged that current functionality of the CRM systems does meet user requirements in the short term and the timeline for next steps should be carefully considered.
65. Therefore, the existing contract will be extended on current terms for 2 years in line with relevant contractual clauses and the development roadmap will be updated to ensure alignment with future organisational priorities over this period. Further and detailed business case development will be revisited in line with these timelines.

**Author(s)**

Cheryl Duggan    Tel: 03000 268162

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## **Appendix 1: Implications**

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### **Legal Implications**

#### **WCAG2.1AA Accessibility Standards**

All websites should be accessible, especially by people with disabilities. Access to websites is governed by the Equality Act 2010 and the Public Sector Bodies (Websites and Mobile Applications) (No 2) Accessibility Regulations 2018 (the regulations).

The Regulations require that organisations must:

- a) Comply with the accessibility requirement (regulation 6) which means the requirement to make a website or mobile application accessible by making it perceivable, operable, understandable, and robust (regulation 3).
- b) publish an accessibility statement in accordance with the model accessibility statement and keep that statement under regular review. (regulation 8).

### **Finance**

More accurate determination of any costs linked to contract extensions will be identified through ongoing procurement activity and will be considered within standard financial planning processes.

### **Consultation**

Ongoing consultation activity continues in line with the current CRM programme.

### **Equality and Diversity / Public Sector Equality Duty**

In relation to the accessibility requirement this would be enforced in the UK through the Equality and Human Rights Commission and the Equality Commission for Northern Ireland are the bodies responsible for dealing with the enforcement of accessible websites or mobile applications of public sector bodies.

Accessibility groups form part of consultation and feedback programmes.

### **Climate Change**

N/A

### **Human Rights**

N/A

### **Crime and Disorder**

N/A

### **Staffing**

N/A

### **Accommodation**

N/A

### **Risk**

Risk will be managed through ongoing governance frameworks

### **Procurement**

A variation to the existing GOSS contract to complete the iCM upgrade and to extend to 31 March 2023 has been put in place and the CRM has been extended. A further extension will be required to both systems.

## Appendix 2: CRM Roadmap

Activity	Project Area	Status	Comments
Revised look and feel of customer portal	CRM Roadmap	Complete	Complete in August 2022
Signposting refresh	CRM Roadmap	Complete	Complete in Feb 2022. Data currently being analysed, and improvement activity will be targeted
CRM & Telephony integration	CRM Roadmap	Complete	Complete in Oct 2022. It was determined by Customer Services that little benefit would be achieved through the integration of the telephony and CRM platforms and the project has therefore been abandoned.
Case Note Deployment	CRM Roadmap	Ongoing	Originally scheduled to be completed this financial year. Analysis to see where case notes should be applied is ongoing, but progress has been impacted by capacity
Member's Portal	CRM Roadmap	Ongoing	Changes to system have been developed and configured in test. Pilot process ongoing with 7 Member's to enhance additional information available. Launch in Q4.
What 3 words Pilot Exploration	CRM Roadmap	Ongoing	Exploring the possibility of integration
Backlog Review	CRM Roadmap	Ongoing	Review and reprioritise the backlog to provide

<b>Activity</b>	<b>Project Area</b>	<b>Status</b>	<b>Comments</b>
			more improvement to services
Front Line training Programme	CRM Roadmap	Ongoing	Ongoing programme across major front-line services July 22 to August 23
Real time data transfer	CRM Roadmap	Ongoing	Likely to be completed by March 2023
Digital Solution Business Case	Business Case development	November 2022 – March 2023	
Accessibility Improvements	CRM Roadmap	March 2023	Majority of CRM now compliant

