

Corporate Issues Overview and Scrutiny Committee

26 January 2017

Corporate Issues Overview and Scrutiny Committee – Customer Relationship Management System Review



Report of Lorraine O'Donnell, Director of Transformation and Partnerships

Purpose of the Report

- 1 To present to Corporate Issues Overview and Scrutiny Committee the Customer Relationship Management System (CRM) Working Group review report.

Background

- 2 The Corporate Issues Overview and Scrutiny committee considers customer services performance as part of quarterly performance reports. Previous overview and scrutiny light touch reviews have been carried out on Telephony and in 2014 the Customer First Task and Finish Group carried out a light touch review on the Customer First Strategy.
- 3 In supporting the delivery of the Customer First Strategy, it was agreed to procure a new CRM system for Durham County Council.
- 4 As the CRM system supports Members in dealing with and tracking their casework and constituents' queries, it was considered appropriate that a small group be formed to enable Members to have input into the new CRM system.
- 5 At Corporate Issues OSC on 17th November, 2015, the Committee agreed to establish a small cross party task and finish group to have input into the new CRM implementation prior to its launch in 2016. The group would look to identify outcomes and make recommendations in respect of:
 - The functionality of the Council's new Customer Relationship Management System;
 - The needs of Members in what the CRM system will deliver for them in terms of service access requests, reporting mechanisms and performance/casework monitoring and tracking. In doing so, the Task and Finish Group should have access to information from other local authorities and their Members who are using the new CRM system and the benefits to those Councils and Councillors from the system;

- Post implementation monitoring of the effectiveness of the CRM system in delivering an effective mechanism to support casework and constituent queries for Members.
- 6 The review group comprised 8 members of the Corporate Issues Overview and Scrutiny Committee. Evidence was gathered over four meetings and a site visit to Northumberland County Council. The project was supported by the Head of Projects and Business Services, Neighbourhood Services; CRM Project Manager, Neighbourhood Services; Senior IT Project Manager (Web Development) and Member Support Officer, Democratic Services, Resources.
- 7 A copy of the review report is attached at Appendix 2.

Service Grouping Response

- 8 The Service welcomes the continuing input to the CRM project from members of the Corporate Issues Overview and Scrutiny Committee. The new CRM system has already broken new ground in many ways, providing modern choices for customers for to contact the council, track and record their service requests and monitor progress and completion.
- 9 As of 17 January 2017 18,500 active accounts have been established on the CRM internet portal by customers wishing to transact online. Since implementation in July 2016 the system has managed over 130,000 service requests across all contact channels, with around 20% of these now coming through online.
- 10 Work remains ongoing with the systems supplier, Firmstep, along with internal colleagues in ICT, Information Management and others, to develop new functionality. Among these is the Member Portal, which seeks to bring members at Durham a high level of reporting and data availability. This work seeks to have products available to members in the summer of 2017.
- 11 Members of the team will be glad to return to the committee with an update on these issues as suggested, as well as further testing with members of the task and finish group as developments progress.

Recommendation

- 12 Corporate Issues Overview and Scrutiny Committee is asked to agree the report of the Customer Relationship Management System and approve submission for consideration by the Cabinet Portfolio Holder.

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Appendix 1: Implications

Finance – N/A

Staffing – N/A

Risk – N/A

Equality and Diversity / Public Sector Equality Duty – N/A

Accommodation – N/A

Crime and Disorder – N/A

Human Rights – N/A

Consultation – N/A

Procurement – N/A

Disability Issues – N/A

Legal Implications – N/A