

Corporate Overview and Scrutiny Committee Management Board

1 November 2018



Customer Relations Management System – Update on progress against recommendations

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

Purpose of the Report

- 1 The purpose of this report is to update members of the Corporate Overview and Scrutiny Management Board (COSMB) on progress made against the recommendations from the review of the Customer Relations Management System (copy attached at appendix 2).

Background

- 2 COSMB considers customer services performance as part of quarterly performance management reports and previously carried out a light touch review on the development and implementation of the Council's Customer First Strategy.
- 3 A fundamental element of the delivery of the Customer First Strategy was the procurement of a new Customer Relationship Management (CRM) System for Durham County Council. Recommendation (ii) of the Customer First Task and Finish Group review report was that:
 - a. Cabinet monitor the implementation and benefits of the new CRM system currently being procured in supporting the delivery of the Customer First Strategy.
- 4 In procuring and developing a new CRM system for the County Council, the project team acknowledged the vital role that the CRM plays in supporting Councillors in dealing with and tracking their casework and constituents' queries. The Corporate Issues OSC on 17th November 2015 agreed to establish a small cross party task and finish review group to input into the development of the new CRM system implementation prior to its launch.
- 5 A review group was set up comprising of 8 members and 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.

- 6 Corporate Issues Overview and Scrutiny Committee commented upon and agreed the review report at the meeting on 26 January 2017 (a copy of that report can be found [here](#)).
- 7 The conclusions and recommendations of this report were also presented to the relevant Cabinet Portfolio Holders.

Recommendations from the review

- 8 The review made the following recommendations:

Recommendation one

Following the successful launch of the Council's CRM system, members support the development of a "Member Portal" facility which will enhance how Councillors deal with their constituents' casework and provide meaningful management information to Councillors on local issues within their electoral division.

Recommendation two

The CRM Project Team investigates the possibility of the CRM/Member portal enabling permissions to be given to Councillors to access cases, where customer permission is given, so they can receive summary information to enable them to update their constituents/residents.

Recommendation three

The CRM Project Team investigates the possibility of the CRM/Member Portal including a method for customers to give consent for details of cases/issues to be shared with their local councillor, in order to protect customers' privacy and personal data in line with data protection regulations.

Recommendation four

A pilot of the Member portal take place in February/March 2017 which will engage a cross section of members of varying IT skills to road test the Member Portal alongside member support staff to give them the chance to enhance how they deal with their constituents' casework and provide meaningful management information on local issues.

Recommendation five

That member induction/training on the new CRM/Member portal system and its functionality is provided to all members elected in 2017, as part of their induction training, with such training to include Data Protection, Information Governance and IT Equipment functionality.

Recommendation six

That a systematic review of the report and progress made against recommendations should be undertaken after consideration of this report, within 9-12 months.

Systematic Review

- 9 The pro-forma attached at Appendix 2 provides an update on the recommendations of the final report.

Recommendations

- 10 The Corporate Overview and Scrutiny Management Board are asked to:
- (a) note the update on the recommendations of the Scrutiny review of the Customer Relations Management System (CRM).

Background papers

Scrutiny Review report of the Customer Relations Management System (CRM)

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Appendix 1: Implications

Finance - None

Staffing - None

Risk - None

Equality and Diversity / Public Sector Equality Duty - None

Accommodation - None

Crime and Disorder - None

Human Rights - None

Consultation - None

Procurement - None

Disability Issues – None

Legal Implications - None