CORPORATE SCRUTINY COMMITTEE

TUESDAY, 8 OCTOBER 2019

REPORT OF THE PORTFOLIO HOLDER FOR ASSETS AND FINANCE

CUSTOMER PORTAL AND CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

EXEMPT INFORMATION

Not exempt

PURPOSE

To update members on the progress to date in respect of the Customer Portal and Customer Relationship Management system.

RECOMMENDATIONS

It is recommended that:
1. Members of the Scrutiny Committee endorse the contents of the report.

EXECUTIVE SUMMARY

The report provides an update on the ongoing implementation of the Customer Portal and Customer Relationship Management system, (CRM), including an outline of what has been delivered to date, how it is being managed and what remains to be delivered.

The Customer Portal was initially due to be in operation in May 2019. However, the Council was notified that the Staffordshire wide CRM system (Lagan) was being decommissioned at the end of September 2019. Therefore priority was given to implementing the CRM element of the project.

The Lagan CRM was successfully decommissioned on the 27 September 2019 and was replaced with the Civica CRM.

The CRM is the foundation to enable the Council to manage how we interact with our customers and supports understanding their needs which will ultimately assist us with shaping service delivery. It stores our customer information including all interactions such as personal details, services requests and complaints/compliments.

To further enhance our customer service offer the Customer Portal will now be the focus of the project team, work on the portal has continued alongside the

implementation of the CRM. Currently in development are 3 processes (moving in or out, single person discount and safeguarding). It is anticipated that these processes along with associated training and communications will be complete by the end of 2019.

In addition the original scope was the development of an on line housing application form. Whilst Civica could develop an application form for the Council, it became apparent their offer was not as comprehensive as was required and would not integrate into the back office housing system Orchard. Therefore an options appraisal was undertaken and Orchard was found to be able to provide an application form which fully integrates into the back office system and Customer Portal. This will be developed and further efficiencies in terms of resource and the accuracy of the information held on the system will be realised. Which includes a saving from 25 hours per week up to a full time post. This will enable resource to be diverted to triage and focus on homeless prevention. As our application forms have increased significantly since the introduction of the Homelessness Reduction Act 2017.

The portal will give all of our customers an account whereby once logged in they are able to self-manage enquiries such as rent and council tax balances, benefits information, change of address and service request / complaints progress.

Once this initial phase has completed a post implementation review will be undertaken to identify further processes to be developed to enhance our customer service offer for example reporting of antisocial behaviour is already in scope.

The Head of Revenues agreed to report to the Committee on the following points:

The annual ongoing costs, including licence fees, payable in respect of this service.

Civica Portal Package & CRM Package Annual Support and Maintenance Annual Charge £18,000. As further APIs/integrations are implemented further budgetary provisions will be required.

Consideration of the robustness of the IT infrastructure to support this service delivery.

The Portal and CRM rely solely on internal infrastructure. In terms of business continuity, all of the servers are backed up nightly. The backup is also mirrored to data storage located at Walsall Metropolitan Borough Council. Data at Walsall is then also backed off to tape quarterly for longer term storage. If we were to lose one of the servers then this would be recovered either from backups held onsite or at Walsall. This could be done within an hour. If we were to lose all of the Portal and CRM infrastructure and it wasn't recoverable locally then we can run it from Walsall providing the connection between the sites was still active and some of the other infrastructure required to provide the service was available at Marmion House.

If we were to lose the building on a long term basis i.e. fire then we would recover systems from data storage at Walsall. This would involve relocating it to another TBC site with a connection to the internet. In terms of a short term power cut, we have no generator at Marmion and the UPS would only run systems for a couple of minutes (enough time for them to be shut down cleanly – this is normal practice).

RESOURCE IMPLICATIONS

£115,000 has been fully utilised from the capital budget. As further services are migrated the need to consider further budgetary provisions will be required.

LEGAL/RISK IMPLICATIONS BACKGROUND

Not applicable

EQUALITIES IMPLICATIONS

Not applicable

SUSTAINABILITY IMPLICATIONS

Not applicable

BACKGROUND INFORMATION

In recent years, customer contacts made via the Customer Service Centre and Customer Service Points have been managed using two main ICT systems:

· An automated call distribution system (ACD) provided by Daisy using Mitel technology that routes calls to CSC agents and certain back office staff that provides sophisticated call handling services, such as call queueing, in queue messaging and pre-recorded options for customers to select.

· A Customer Relationship Management (CRM) system provided by Lagan Kana that logs customer interactions against a unique customer history. It creates and manages cases for resolution by the back office and provides scripted assistance to CSC Agents to allow them to answer as many enquiries as possible at first point of contact.

This core system has now been replaced with the Civica CRM system which went live on 27 September 2019. Alongside the Civica Customer Portal it supports the Council's Digital First vision and It aims to provide better functionality for customers to self-serve, improve customer contact handling efficiency, streamline the number of technical systems deployed and explore the potential of cloud based solutions.

REPORT AUTHOR

Michael Buckland, Head of Revenues, Tel 709523
e-mail michael-buckland@tamworth.gov.uk

LIST OF BACKGROUND PAPERS