CHESHIRE EAST COUNCIL

REPORT TO SUSTAINABLE COMMUNITIES SCRUTINY COMMITTEE

Date of meeting: 25th October 2012
Report of: Paul Bayley, Customer Service and Libraries Manager
Title: Customer Relationship Management Project

1. Introduction

This report provides an update on the implementation of the new customer relationship management system into the Council's contact centre.

2. Background

A report was presented to the Sustainable Communities Scrutiny Committee in January 2012 on the customer contact volumes received in response to the north waste transformation and silver bin roll out. The report explained that lessons had been learned from the experience during the south waste transformation and customer contact had been much lower during the north waste transformation. Improvements to the waste and recycling pages on the Council's website played a key role in reducing call volumes for the north transformation. The Customer Relationship Management (CRM) system that Customer Services was using was the same system as the Waste teams were using which meant customer information from calls received could be shared and better records were maintained. The CRM could be used to check whether there were any patterns in the calls being received to see if there were particular areas of the borough that were having issues with silver bin roll out. Councillors were interested to know more about the CRM and how it would improve Customer Services and help to monitor trends in the calls received.

3. CRM Project

The CRM project was initiated in November 2010 and is due to complete in December 2012. The system is a key enabler to help the Council deliver the strategic principle from its Customer Services Strategy to increase resolution at first point of contact and reduce avoidable contact caused by service failures, progress chasing and poor communication.

The scope of the project has covered customer contacts received by the Council's contact centre relating to:

- Births, deaths and marriages
- Blue Badges
- Community safety
- Customer feedback (complaints, compliments and suggestions)
- Development management
- Environmental health

- Free school meals
- Income
- Licensing
- Parking
- Requests for information (freedom of information, data protection)
- School admissions
- School transport
- Streetscape
- Waste and recycling

The original scope also included end to end case management for blue badges, customer feedback and requests for information. During implementation the project scope has been extended to cover back office processes for Community Safety, Streetscape and Waste and Recycling, allowing the decommissioning of some legacy systems used by these back office teams. The project has also considered future opportunities by implementing functionality that provides the foundations for further developments, such as introducing handheld devices for mobile workers to access the system remotely for services such as Community Safety, and so remove the need for them to return to the office to access and update service requests.

The project has encountered a number of issues which have resulted in delays to completion. These have included:

- The complexity of managing multiple implementation partners
- Release of a new version of the Microsoft Dynamics software in April 2011
- Continuous resourcing conflicts within the ICT Shared Service
- Changing business priorities, e.g. acceleration of waste transformation by 6 months
- The need to review ways of working and harmonise former district services before implementation on CRM.

The system is now delivering on its promises and we are seeing the realisation of benefits across a number of customer processes. These benefits can be grouped into a number of themes.
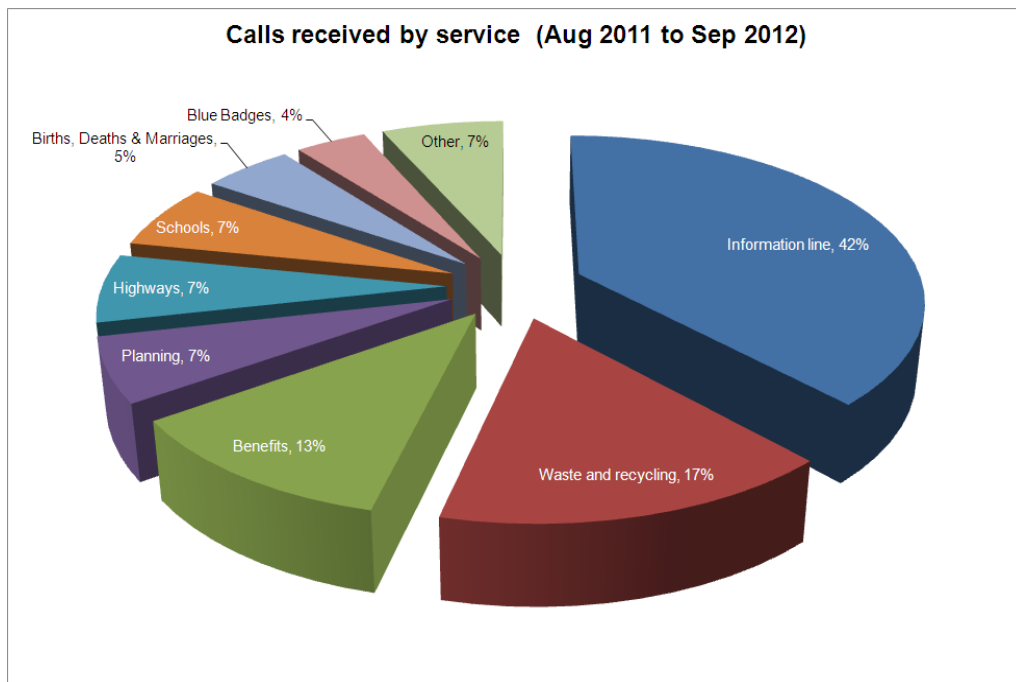
- **Increased resolution at first point of contact**; structured forms on the CRM have been designed to ensure that all information required to process a service request is captured at the first point of contact. Where the back office also uses the CRM, such as waste and recycling, a job sheet is automatically created to be assigned to a crew. Environmental health service requests are passed to another system used by the back office (Civica APP) but system integration ensures the service request details are passed from the CRM accurately, and Customer Service Advisors are able to track progress of any environmental health service requests through real-time integration that provides an update on the current case status in Civica APP.

- **More efficient and effective processing of service requests**; the CRM has been designed to re-use information it already holds about a customer and where appropriate use information keyed by the customer themselves online.

For example, the information entered for a blue badge application submitted online, either directly by the customer or assisted by a Customer Service Advisor in the contact centre, is the information that is ultimately used, following assessment and verification, to generate the blue badge through the government's new central blue badge production system.

- **Improved process compliance**; Team Leaders within the contact centre can build their own management information dashboards. In some cases this has helped to identify service requests that have or could become stuck in the workflow, possibly due to user error or, for example, because an incorrect payment was taken for a certain pest control treatment. These dashboards are helping to ensure service requests do not get held up and also identify where specific users may require further training.

- **Improved management information to identify and reduce failure demand**; the greatest benefit from the CRM is the information it provides on why customers are contacting the Council, and in particular where this contact is the result of failure demand. Identifying and addressing the root cause of failure demand presents a great opportunity to increase customer satisfaction and reduce operating costs. The next section provides further information on how the CRM is helping to reduce failure demand from waste and recycling.

4.   Identifying and reducing failure demand – waste and recycling

Waste and recycling remains the best example of how the CRM can help to identify and reduce failure demand. Waste and recycling calls represent 17% of all the calls received by the contact centre. We now have waste contact data within the CRM from October 2011 and both front and back offices use the CRM to raise and update service requests and so the CRM data represents a more complete history of the customer experience than with other services where service requests are handed off to other back office systems.

Calls received by service (Aug 2011 to Sep 2012)

- Information line, 42%
- Waste and recycling, 17%
- Benefits, 13%
- Planning, 7%
- Highways, 7%
- Schools, 7%
- Other, 7%
- Births, Deaths & Marriages, 5%
- Blue Badges, 4%

Call volumes for waste and recycling peaked from July 2011 to October 2011 as changes to waste and recycling collections were introduced across the borough. Our telephony systems enable us to monitor the volume of calls received for different services.

Waste and Recycling call volumes

The CRM, however, enables us to analyse what the reasons for this customer contact were. The below graph provides the breakdown of waste and recycling transaction types recorded on the CRM since January 2012.
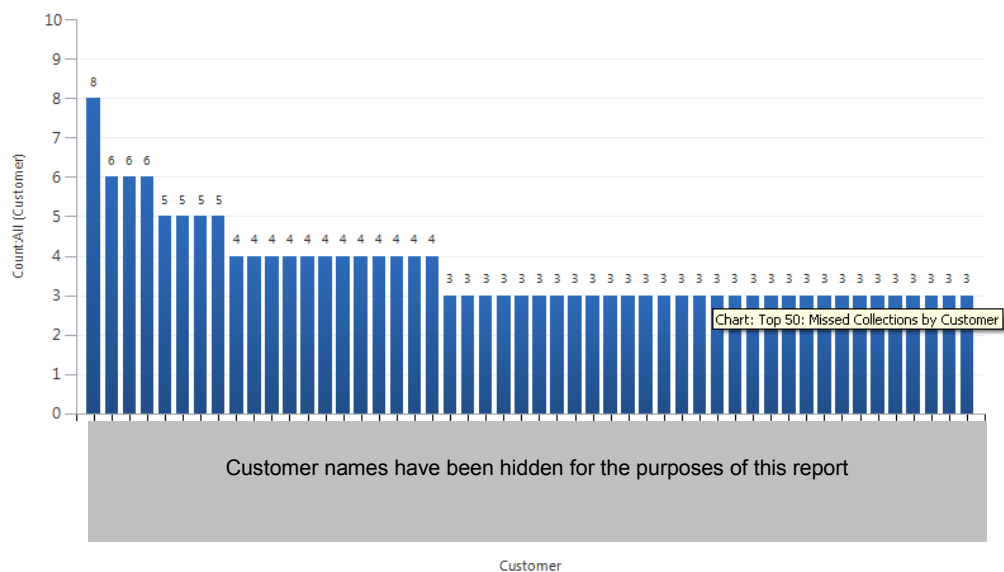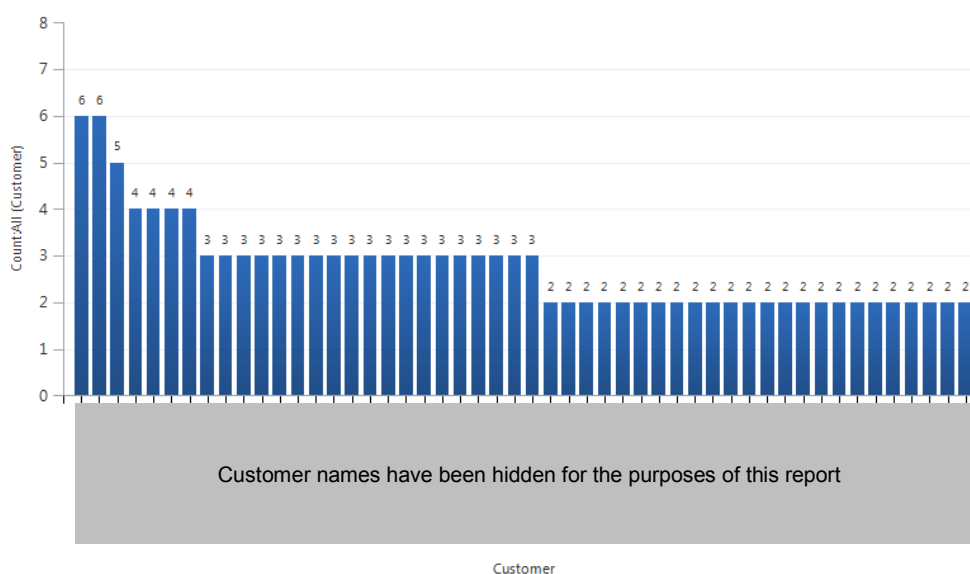
Case by Transaction
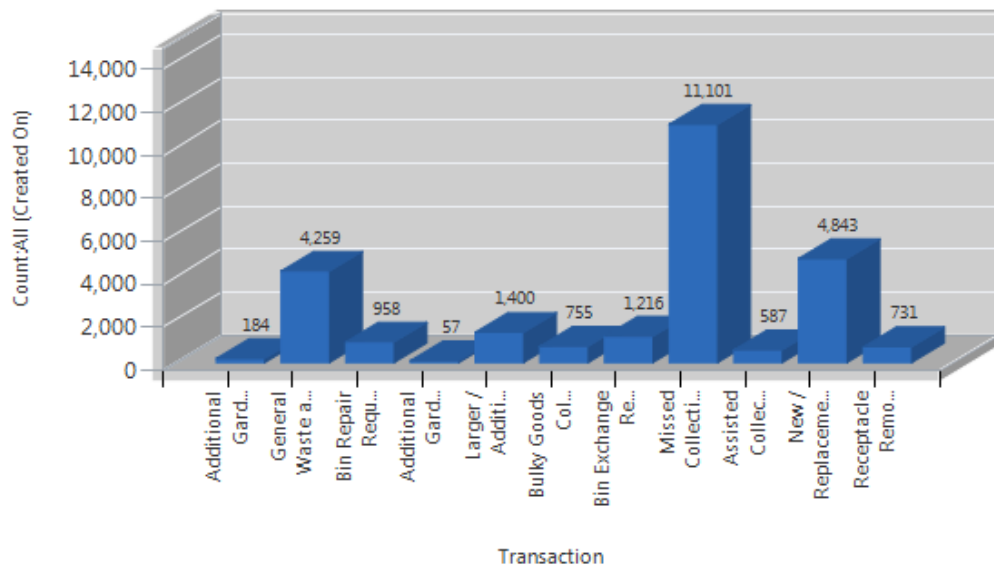
Missed collections are the biggest issue for customers, with certain customers experiencing missed collections on a regular basis. The next two graphs provide the top 50 customers that have reported missed collections and missed *assisted* collections in the previous two months.

Top 50: Missed Collections by Customer

Customer names have been hidden for the purposes of this report

Top 50: Missed Collections by Customer   ✕

Customer names have been hidden for the purposes of this report

Customer

This data is reviewed with the waste and recycling collection teams to enable them to investigate why these customers experience more missed collections than others and identify actions to prevent reoccurrence. Similar data is also analysed by postcode to identify trends in customer experience for specific collection routes.