

Report to	Performance Scrutiny Committee
Date of meeting	19 March 2020
Lead Member/Officer	Councillor Huw Hilditch-Roberts (Lead Member for Education, Children's Services & Public Engagement)/Liz Grieve (Head of Communities and Customers)
Report author	Ffion Angharad (Service Improvement Manager)
Title	C360 CRM (Customer Relationship Management System) – Update

1. What is the report about?

1.1. This report provides an overview of the implementation and development of the new C360 CRM during the first 12 months.

2. What is the reason for making this report?

2.1 To enable the Committee to fulfil its scrutiny role in monitoring:

- a) The implementation and development of the C360 CRM system
- b) The system capabilities in terms of delivering efficient and effective customer focussed service

3. What are the Recommendations?

- 3.1 That the Committee considers the contents of the report and, if appropriate, identifies any areas that require further scrutiny; and
- 3.2 That a further report be submitted to the Committee for consideration following a reasonable period of time operating as business as usual.

4. Report details

As the C360 CRM project is still at implementation stage, it is not possible to report fully on 'performance in line with the product specification and the Council's expectation' at this time. This will be considered once the project closes and the system operates on a 'business as usual' basis.

Further to this, as the C360 CRM is a replacement system (essential due to the original LACRM having reached 'end of life') we can only assess its value against the risk of not procuring i.e. continuing to operate using an 'unsupported' product which would eventually become 'not fit for purpose'.

4.1 Background

Following a period of consultation with service staff and users during 2018, the C360 CRM system was implemented between February – April 2019.

Whilst the core product includes a 'keeping the customer informed' feature in terms of emails sent automatically following service request updates by officers; in house developments have enhance the product by enabling bespoke automated weekly reports to be emailed to Councillors and CT&CC's.

The automation of this system, not only provides an end to end user process (from frontline services to back office fulfilment) for dealing with service requests but has also improved the customer experience by reducing the need for customers to contact the council for updates. Further efficiencies have been achieved by reduced transactional costs as the system addresses 'latent demand' in terms of those customer who already have a propensity to self-serve

A timeline of the milestones and achievements are as follows:

2019	Action	Outcome
April	Completion of the 6 week phased 'go live' approach	58 service request forms launched

May	Bespoke weekly service request reports created for all Councillors & CT&CC's	Emailed automatically and include details of the original enquiry and officer updates
July	Your Voice module launched (compliment, complaints & feedback policy)	This is now an 'end to end' C360 process
August	Officer notes included in all email notifications sent to customers,	Keeping customer informed as to action taken in response & to complete their request
September	General Enquiry forms for all services enquiries launched	Sent direct to services avoiding the need to triage email enquiries not yet on C360
November	Lesson Learnt / post implementation review workshops held with services	Feedback used to create and deliver change requests to improve C360 process flows.
December	Performance reports created in response to service requests	To inform performance indicator reports / indicators
2020		
February	Customer self-serve on-line account (Customer Portal) launched	Available to any customer who registers online
	Attend all MAG meetings to provide update	
	Formal Councillor training delivered	2 x 2hr sessions – 7 attendees
March	Formal Councillor 'drop in' C360 sessions scheduled	4 x 1hr session schedule each week in March to follow Councillor led meetings
April	Informal 'drop in' C360 sessions planned County wide	4 x 1hr weekly sessions to be arranged at different locations through Denbighshire

Future work:

- ✓ To work with services to improve customer notes/feedback
- ✓ Develop more service request forms to achieve further efficiencies through reduced transactional costs.
- ✓ Monitor performance and work with services to achieve key indicators / measures.

5. How does the decision contribute to the Corporate Priorities?

5.1 The C360 CRM directly contributes to the corporate plan: Working together for the future of Denbighshire; and its emerging priorities.

6. What will it cost and how will it affect other services?

6.1 Information provided as part of the original business case.

7. What are the main conclusions of the Well-being Impact Assessment?

7.1 This was submitted for info and considered as part of the original business case.

8. What consultations have been carried out with Scrutiny and others?

8.1. Consultations were carried out as part of the original business case.

9. Chief Finance Officer Statement

9.1 This was provided as part of the original business case.

10. What risks are there and is there anything we can do to reduce them?

10.1. Considered as part of the original business case.

11. Power to make the decision

11.1. Sections 7.3 and 7.4.2(b) of the Council's Constitution outlines the Committee's remit and powers with respect of Services' performance.