

<b>Report to</b>	<b>Performance Scrutiny Committee</b>
<b>Date of meeting</b>	<b>25 November 2021</b>
<b>Lead Member / Officer</b>	<b>Lead Member for Education, Children’s Services and Public Engagement – Councillor Huw Hilditch- Roberts/Head of Communities and Customers – Liz Grieve</b>
<b>Report author</b>	<b>Service Improvement Manager – Ffion Angharad</b>
<b>Title</b>	<b>C360 CRM System Update</b>

## **1. What is the report about?**

1.1. This report provides an overview of the implementation of the C360 Customer Relationship Management (CRM) system, and its performance relevant to the product specification. It also outlines council services’ use of C360 as a corporate CRM or integrated customer contact solution, and their continued demand for new customer enquiry forms.

## **2. What is the reason for making this report?**

2.1. To enable the Committee to fulfil its scrutiny role in relation to services/the Council’s performance relative to customer contact and satisfaction, whilst realising value for money.

## **3. What are the Recommendations?**

3.1. That the Committee considers the content of this report and, if appropriate, identify any areas that require further scrutiny.

## 4. Report details

### 4.1 Background

The C360 CRM system agreement was finalised in 2018, having evaluated and considered the suppliers' (Civica) proposal which met and delivered most of DCC's requirements with particular consideration for:

- the need to replace the existing 10-year-old LACRM system (which was defunct as it was no longer supported by the suppliers and represented a risk in terms of IT security)
- removing the council's dependency on Lotus Notes - as the organisation moved onto the new corporate Microsoft solution as the Council's main business platform.
- A requirement for a multifunctional CRM system which provides:
  - a single view of a customer's enquiry history;
  - enables residents/customers to directly log, track and manage service requests independently;
  - provides service operators with a central management work queue to action service requests from all customers from multiple access channels.

C360 is a multi-channel solution directly supporting web, telephone, face to face, post, email, SMS and mobile communications

### 4.2 Headlines

The C360 CRM system was implemented over a 6 week phased approach from February 2019 – to date we have 60 active service request forms. See *appendix 1 for details*

Post implementation developments continued, and over the next 12 months we saw several new improvements 'go live':

- ✓ bespoke weekly C360 Councillor and management performance reports distributed.
- ✓ Your Voice - unified compliments, complaints, suggestions, feedback platform
- ✓ Email updates sent to customers confirming action on completion
- ✓ Self –service (Customer Portal).

Officers identified as C360 users and all Members were invited to attend one of a number of scheduled training sessions – on the whole these were well attended.

One of the main features of C360 deliverables is the ability for officers to add updates/customer notes to service enquiries, which are automatically delivered to customers, creating better customer information without impacting service capacity. See Appendix 2 for examples of Good practise

Whilst performance is measured at service level in terms of responding to C360 service requests / enquiries, corporately, performance in terms of delivering within target date is very positive - 84% of all C360 customer enquiries were completed and closed within the 10-day target date. See appendix 3 for more information.

### **4.3 Highlights**

C360 deliverables (additional to LACRM features) include the following:

- Improved working practice for services e.g. provides a unified/single customer contact management system i.e. no separate back office systems;
- Improved service to our customers:
  - accessible anytime, anywhere using customers preferred contact method with the option to self-service i.e. new Customer Portal
  - All residents/customers have the ability to directly log, track and manage service requests without having to rely on Council opening hours.
- Making our front line staff more efficient and effective e.g. ability to capture essential enquiry details at 1<sup>st</sup> point of contact with the use of predefined service specific customer enquiry forms i.e. specific questions asked
- Enquiry updates sent automatically to customers via email notifications, reducing 'avoidable' contact and therefor demand on direct contact with council staff.
- Weekly individual bespoke automated Cllr and CT&CC reports emailed direct i.e. no need to log onto a separate platform (EMMA) to monitor updates
- Service performance/business support officers able to run bespoke reports to monitor customer demand, to identify problem areas, lessons learnt and continuous improvement opportunities.

- Fully compliant with the Welsh Language Standards - default language on creation of customer account and Welsh language service requests forms.
- Full integration with:
  - **Local Land and Property Gazetteer** (LLPG) – street and property data from the Council’s LLPG system;
  - **Geographic Information system** (GIS) - allows users to interact by dropping pins on a Denbighshire map to show a specific enquiry location e.g. for fly tipping.

Introduced ‘pre-defined’ fulfilment notes for service officers to quickly select on completion/closure of high volume simple transactions – improves back office admin efficiency (less time) and provides consistency in terms of customer feedback. See Appendix 4 for examples of good practise

#### **4.4 Limitations and considerations**

- *ICT development* time required to make even simple changes or deploy new forms, is unacceptably high compared with similar systems deployed by DCC.
- *The C360 technical capabilities* provides efficiencies as it demands less manual intervention, i.e. less time spent on admin work. However, in reality, cuts were made to back-office functions before the system was put in place, without a full understanding of the admin support required
- Services report that C360 is very slow to refresh as information is being inputted which results in frustration from officers. Reasons for this have not been fully identified but they are partly due to the software platform itself
- *C360 offers a ‘single’ customer management system* i.e. ability to log enquiries and fulfil them using only one system; in reality, many services continue to use their own customer contact management system which means this benefit is not realised.
- *Training & support* – following the initial user training for Members, frontline staff, back office and administrative staff there has been no follow up due to resource pressures. As a result, quality and consistency of system use and customer feedback updates have been compromised and new staff have had to rely on train the trainer sessions for existing service staff.

- Your Voice module – not all features of this module are always used/completed by the customer/by services which creates more work for the Complaints services having to compile manual reports for the commissioner/audit.
- C360 Reports – using intelligence that is available from C360 reports can evidence demand and inform future policy and resource allocation, but this function is not widely used. further training and support to enable services to make better use of reports to enable them to address systemic issues, manage demand, identify lessons learnt and enable continuous improvement.

## **4.5 Next Steps**

The C360 project team haven and continue to work closely with services to review and improve processes to meet service requirements.

Workshops with C360 service Champions originally delayed due to COVID will be reinstated.

The 'mobile' capabilities of C360 is being piloted so that officers out on the ground can pick up enquires in real time and respond in a timely manner, immediately if urgent and/or an emergency.

A corporate Customer Contact Project is currently being scoped – this will look at customer requests for council services and how we respond with a view to simplifying processes for all. Work will commence shortly to develop requirements and specifications for the next procurement exercise, using what we know now and lessons learnt

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

The implementation and development of the C360 CRM directly contributes to the corporate priority of: Connected Communities - Communities are connected and have access to goods and services locally, online and through good transport links

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

This is a performance report therefore there are no cost implications.

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

This is a performance report; a Well-being Impact Assessment was completed as part of the implementation plan and any conclusion identified which impacted on staff or the community were addressed before the implementation delivery.

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

All undertaken as part of the project implementation plan.

## **9. Chief Finance Officer Statement**

There are no obvious financial implications arising from the report.

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

N/A

## **11. Power to make the decision**

- Section 21 of the Local Government Act 2000
- 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.