

Delivering a Dynamic Customer Centric Service, and at the Same Time Delivering £200,000 Cost Saving

Optevia



This has been a major achievement for Castle Morpeth Borough and Alnwick District Councils, who have joined forces to become a centre of excellence for customer relationship management.

Mike Kenworthy, ICT partnership manager, Alnwick District Council discusses.



Over a two phase project, we have web-enabled many of the services that would normally require paper forms, lengthy phone conversations or visits to council offices. The new Shared Services CRM system provides direct access via the internet to a wide range of information and enables individuals to fulfil requests online, automatically initiating data updates and workflow processes. Revolutionising the way we interact with the community, enabling them to directly request services, update records and communicate in a smarter, more efficient manner. In addition, as a shared services deal, this has saved the councils around £200,000 in software installation costs and more than £27,000 in running costs per year.

Both Northumberland councils serve rural communities: Castle Morpeth with a population of 49,000 and Alnwick, one of the most rural and sparsely populated districts in the UK, with a population of 32,000. The Councils provide a wide range of services for local residents and work closely with partners and community groups to ensure that they remain an excellent place in which to live.

After a period of research and evaluation of the vast range of available technologies, we created a detailed technical specification and system requirements document, to source a web portal and CRM system that would serve both councils' community engagement strategy. With the competitive tendering process completed, Microsoft Dynamics CRM and CRM consultants Optevia were selected to deliver the complete Shared Services solution.

The Microsoft Dynamics CRM supports 50 per cent of the councils' customer interactions and delivers more efficient handling of customer communications as well as greater

transparency throughout the lifecycle of key business processes. By creating an integrated system using virtualised architecture, the whole solution has been designed to support both councils simultaneously – yet independently and is currently used by over 600 staff, across six sites.

By providing a dedicated IT infrastructure across the two authorities we are enabling public services to be more citizen-centric, providing a single point of contact or 'one stop shop' for the community, as well as providing the best possible value for money. In addition, using Dell Servers has significantly reduced both costs and the environmental impact.

We selected Optevia, because of their vast experience and expertise in delivering CRM solutions. As an IT consultancy they demonstrated their specialist knowledge in designing, implementing and integrating customer relationship management systems for public sector organisations and have a long pedigree of delivering business intelligence and data management systems based on Microsoft technology. To meet our requirements, their solution was customised and specifically designed to address our needs for low risk, standardised, easy to integrate, easy to use, shared service CRM.

By deploying the Optevia Local Government Template and building on the foundations of Microsoft Dynamics CRM, we have sourced a host of pre-built business processes, integrated activities and workflows, thus enabling us to rapidly deploy complete processes and an almost 'ready-to-use' customer engagement portal.

Optevia provided an extremely efficient and almost painless implementation of a complete the system across the organisation, as well as supporting the transition in working practices for council staff. The predefined process templates have been customised, to provide automated workflows to support the ten most popular service areas for each council. Whilst each council has a separate database and has selected different service templates to roll out, the CRM is delivered as a shared service.

Alnwick District Council selected service templates for: Housing Repairs, Tourism Processes, Job Applications Processes, Pest Control, Missed Bins, Fly Tipping, Dog Fouling, Litter and Dog Bins as their priority for delivering against the e-government project. Whereas Castle Morpeth Borough Council opted for: Forms, Service Enquiry, Household Waste Management, Change of

Address, Garden Waste Removal, Bulky Item Collection, Pest Control, Planning Control and Licensing of Taxis as the most beneficial services to deliver in the first phase.

Both councils enjoy the same look, feel and usability, but can only access their own data, with certain fields only visible in the appropriate council's view, thus ensuring security of data, which is paramount, as well as offering flexibility and future proofing of the system. The web based system has proven to be straightforward and uncomplicated to use, both for the citizens and for our staff responding to enquiries. The automated workflow system has also removed a large amount of internal and external mail, with an obvious reduction in paperwork processing.

The ICT teams are dedicated to delivering an excellent, accessible service to the community, through progressive use of technology. The IT investment we engage in must be appropriate to the task, represent good value for money and deliver benefits that improve productivity and reduce our environmental impact.

The key to the success of this project is the partnership and the collaboration which has developed from the outset between the both councils and the Optevia consultants. Customer service team members from both councils contributed to the design of the system and each council department has been proactive in building the system, alongside Optevia. The teaming experience has been very positive, the knowledge transfer that has resulted from the sharing of our expertise means the councils' IT teams will support and develop the system alongside Optevia in the future.



With the success of the project so far, the future holds visions of extending the integration of Microsoft Dynamics CRM with other key back office systems such as planning, revenues and benefits, and with their existing document management system, as well as the development of the Microsoft Dynamics CRM. Building upon the

Government's vision of modernisation, the councils are meeting the challenges of providing a responsive public service, quality services through efficient use of information technology and working together to save costs and develop best practice processes for all.

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