

Government Regulator Streamlines Public Service with Customer-Centric Solution

The Pensions Regulator



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The Pensions Regulator aims to offer a more responsive and professional customer service as part of its customer contact strategy. Its existing business solutions were becoming dated, making access to information unwieldy for staff dealing with customers. A Microsoft Dynamics™ CRM implementation has made a significant difference, giving these employees the information they need to provide customers with informed, timely responses.

At a Glance

Customer: **The Pensions Regulator**

Web Site:
www.thepensionsregulator.gov.uk

Customer Size: **100-5,000**

Country or Region: **United Kingdom**

Industry: **Public Sector**

Partner: **Optevia**

Customer Profile

The Pensions Regulator is a public sector organisation that regulates the running of work-based pension schemes in the United Kingdom. It protects members' benefits and encourages high standards in pension schemes administration.

Software and Services

- Products
- **Microsoft Dynamics CRM**

Business Needs

The Pensions Regulator oversees work-based pension schemes in the United Kingdom. It aims to improve confidence by protecting members' benefits and encouraging high standards and good practice in running pension schemes.

The organisation constantly seeks to deliver a more responsive and professional customer service. Employees speak to a wide range of people involved in running pension schemes every day, including trustees, managers, actuaries, auditors, employers, and pension scheme members. The information they gather from this communication is vital to the business, helping them provide a more informed, efficient service with each exchange as well as building up a history of customer contacts.

Until recently, The Pensions Regulator relied on a range of legacy IT systems to capture and hold customer data. But its ongoing strategy to deliver effective regulation demanded more innovative and flexible service methods and this prompted the regulator to renew its IT strategy. Samantha Durrant, Head of Customer Support, The Pensions Regulator, says: "We didn't have a contact management system. All we had was a custom-built

database, which wasn't primarily constructed with the retrieval of customer information in mind."

Durrant explains that one of the biggest challenges was the lack of an organisation-wide view of customer information. "We needed better ways of knowing who was dealing with each customer, and a history of each case," she says. "But there was lack of consistency in our approach to dealing with customers."

To accurately assess risk, advisors required access to more detailed information. "We needed to capture more data to analyse our customers' needs, as well as to confidently monitor and predict contact trends," says Durrant.

Solution

Durrant searched the market before choosing to work with Microsoft® Certified Partner Optevia. The company's extensive experience working with government sector organisations—and its track record in deploying customer relationship management (CRM) solution Microsoft Dynamics™ CRM—were key factors for The Pensions Regulator. Durrant says: "We looked at a number of solutions but Microsoft Dynamics CRM

met our business requirements, one of which was a solution that could deliver at least 80 per cent of our needs out of the box."

In 2006, The Pensions Regulator rolled out Microsoft Dynamics CRM, and, using a range of customisation features, soon adapted it to meet its security needs. Around 250 of the organisation's 300 people use the solution to capture and access all inbound and outbound customer contact data. A customer support advisor, for example, may receive a telephone call from a customer. In the past, they'd write a telephone note and later update the system—which held limited data—with a summarised version of the information. Today, the advisor can input data directly or retrieve the entire history of that customer from the system before deciding what action needs to be taken—all while the customer is still on the phone.

The organisation's document management system eDOCS holds all incoming and outgoing correspondence, including e-mail messages and scanned letters and faxes. The integration of Microsoft Dynamics CRM with eDOCS ensures users don't have to operate two systems independently. "A letter is scanned into the eDOCS system and the relevant activity is automatically generated in Microsoft Dynamics CRM, prompting the employee to complete the task," says Durrant. Likewise, if a user creates a document, they can automatically generate activities in the contact management system. Durrant says: "The next time a particular customer contacts us, the advisor can access more in-depth, timely information, helping them respond to that person's needs faster."

Benefits

The Pensions Regulator is among a number of public sector organisations in the United Kingdom that have now rolled out Microsoft Dynamics CRM. Durrant says that automated job queues and the ability to allocate work electronically are among a number of benefits that have emerged since implementing the solution. It also helps The Pensions Regulator comply with legal requirements such as Freedom of Information and Data Protection Acts. "Microsoft Dynamics CRM and its integration with the document management system helps provide a secure audit trail of cases, which can be accessed quickly and easily by authorized users if required," she says. Other benefits include:

- Better customer service in line with the organisation's customer contact plans—advisors or case managers have all the information they need to help a customer. They can provide a more consistent service, supported by detailed, accurate information.
- Fast time to market—just 16 weeks were needed to roll out Microsoft Dynamics CRM, from initial procurement to deployment. "People with experience in similar deployments felt 16 months would be challenging for a public sector rollout, so 16 weeks is a significant achievement," says Durrant.
- Greater security—the organisation has customised the solution to deliver a more consistent approach to holding sensitive, public information.
- Ease of use—integration with Microsoft Office Outlook® means that users can operate the solution from a familiar interface, accelerating adoption and reducing the amount of training often associated with IT

implementations. "User feedback has been very positive because the system is easy to use compared with many of the other products we looked at," says Durrant.

- Reduced duplication of effort—integration with the document management system, along with a more intuitive interface, ensures information is entered just once. Errors are reduced, while information remains up to date and accurate.
- Single view of information—employees can extract and break down data according to a variety of factors such as case type. Information can be viewed across the business and used to analyse trends.
- The Pensions Regulator expects to cut costs through improved efficiency, ensuring that resources are refocused on higher priority activities within the business

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