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Optevia Essentials for local government

Introduction

An overview of the Optevia Essentials for local government

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Contents

- 2 Optevia Essentials for local government
- 3 Benefits of Optevia Essentials for local authorities
- 4 How Optevia Essentials work
 - Integration with internal systems and processes
 - Integration with external systems and processes
- 6 Optevia Essentials usability
- 7 Optevia Essentials implementation

Optevia Essentials for local government



Optevia Essentials for local government are a commercial off-the-shelf (COTS) product family, comprising a Base Essential and a series of over 50 particular Local Authority service essentials that map and automate a wide range of common UK council business processes, based on Microsoft Dynamics CRM technology.

Representing a collection of integrated customisations, web services and back office system integration points for Microsoft Dynamics CRM, the Optevia Base Essential provides a combination of generic functionality including:

- Self service web components
- a customer database
- address look up
- Local Land and Property Gazetteer database (LLPG) lookup
- payment processing
- eForms integration
- geographic information system (GIS) integration
- streamlined navigation
- and specific business processes

However, Optevia Essentials present much more than a set of screens and data capture customisations. The rich set of workflow rules replicates both simple and complex local authority business processes for both back and front office services. Further the LLPG, payment and eForms integration web services can be directly or indirectly integrated with an authority's existing processes.

Optevia Service Essentials have been developed by Optevia's experienced public sector CRM consultants in conjunction with local authorities. As a product family, our Optevia Service Essentials continue to grow as more local authority services are added.

Benefits of Optevia Essentials for local authorities

Optevia Essentials have been built to reduce the effort, cost and risk of implementing Microsoft Dynamics CRM at a local authority. They have been designed based on best practice and experience gained by Optevia working with a broad cross-section of UK councils over the past 6 years.

Optevia Essentials, in conjunction with Optevia's 4Ds methodology, allow authorities to gauge the scale of a CRM project, drive the implementation and manage the cultural change that a CRM implementation entails:

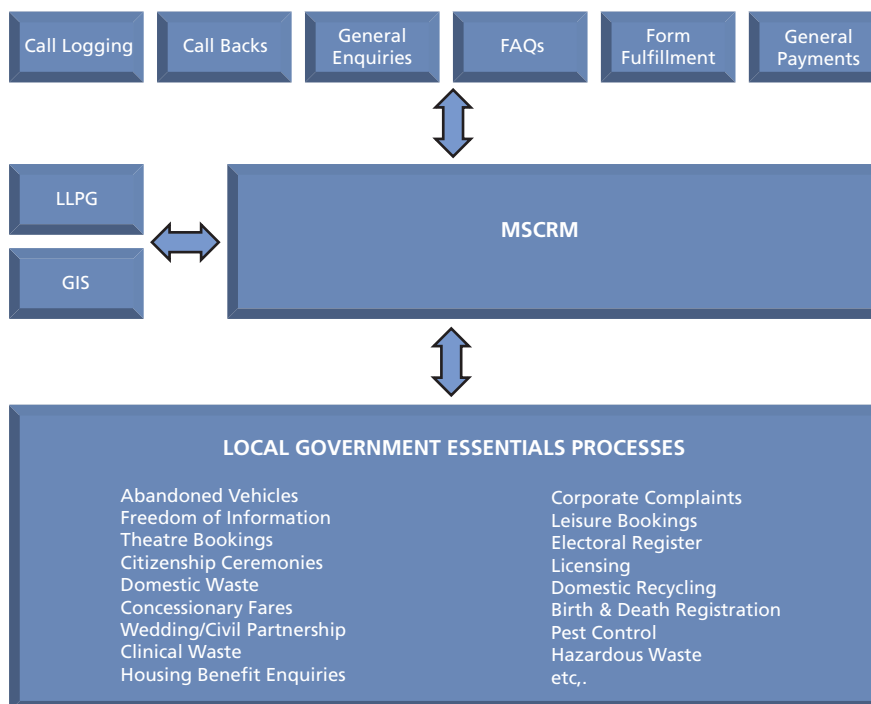
- Optevia Essentials allow authorities the luxury to determine the depth of the technical and business integration most suitable to their specific requirements
- Optevia Essentials fully conform to the support policies for Microsoft Dynamics CRM, which minimises the ongoing support and future upgrade costs for the application, underpinning a councils return on investment.
- Optevia consultants can concentrate on managing the benefits of cultural change from the implementation of CRM rather than creating new functionality with every project.
- Optevia Essentials were born of experience and best practice expertise, meaning many potential implementation pitfalls are naturally avoided

Ultimately Optevia Essentials are designed to improve an authority's return on its investment in Microsoft Dynamics CRM.

How Optevia Essentials work

Integration with internal systems and processes

Supporting both front of house and back office processes, Optevia Essentials have been specifically designed to cater for a number of generic functions which are common across multiple areas when dealing with customer requests.



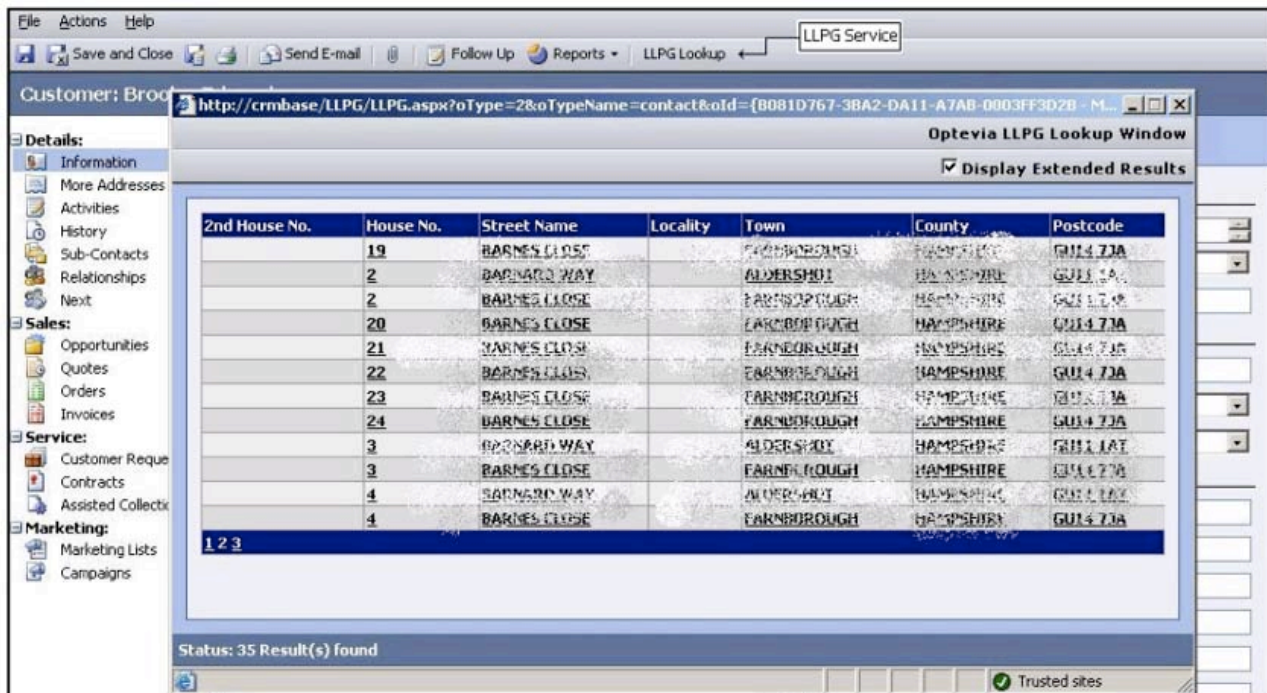
Optevia Essentials optimise the capture of management information to allow authorities to determine:

- activity by subject or business area
- activity by channel (face to face, telephone, email, web)
- request type (general enquiry, form fulfilment, service request, complaint)
- productivity, outcome (resolved on first contact, service request initiated)

Integration gateways mean bi-directional updates can be supported between a specific Optevia Essential and a back office application. This enables customer services to pass on appropriate information to answer a request without having to access a back office system directly. Similarly updates can be made from the back office to a specific Optevia Essential. Authorisation profiles control access and permissions as appropriate.

Integration with external systems and processes

Optevia Essentials provide a BS7666 compliant standard address template which allows integration with an external LLPG database from wherever addresses can be maintained within Microsoft Dynamics CRM. It can either support direct access to a LLPG database or provide an extract database (where periodic downloads can be taken from the LLPG).



Support for GIS access and data lookup is available via a web service. When called, this retrieves the known X and Y coordinates and can pass these on as parameters.

Optevia Essentials have been configured to interface to online payment systems.

Payment details are passed to the payment system and a confirmation code/receipt is subsequently returned to be stored against the customer's history.

A variety of e-Government compliant options are available to provide integration to other back office applications ranging from web services to BizTalk based interfaces. The final choice for integration is typically made on an individual back office application basis.

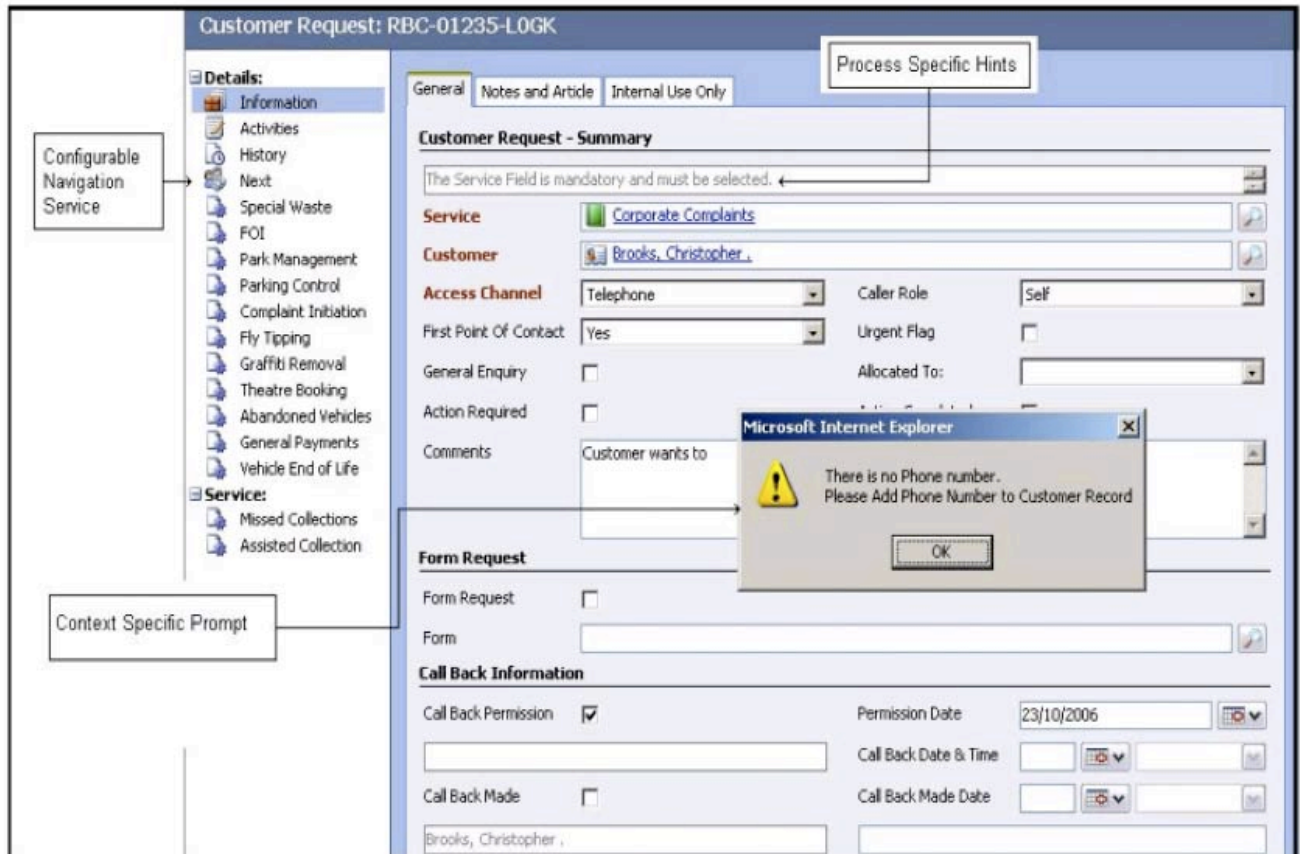
Optevia Essentials for Local Authority self service

Optevia Essentials have been designed to work hand-in-hand with the Optevia Dynamic Portal. Dynamic Portal is a software set designed to help Public Sector organizations reduce the cost of transacting with the customers & organizations they serve & work with by enabling self service.

All Dynamic Service Essentials can be "front-ended" with Optevia Dynamic Portal software components to enable an end-to-end self service solution. This includes end-user authentication, and the ability to use web standards & design tools already in use at a Local Authority.

Optevia Essentials usability

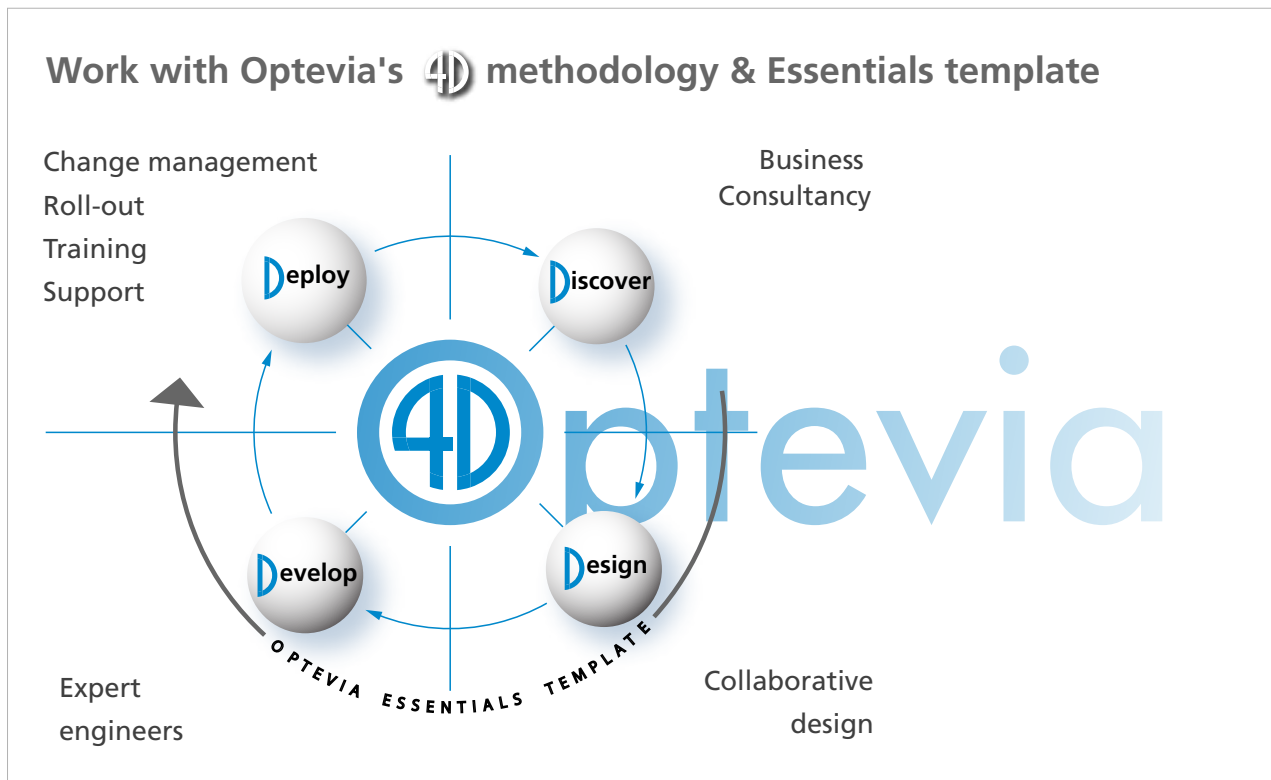
Optevia Essentials enhance the Microsoft user interface with configurable navigation support, user hints and contextual prompts which significantly enhance the ease of use and reduce the learning experience for new users.



Optevia Essentials implementation

Choosing Optevia Essentials is more than simply selecting appropriate software products. It is supported by Optevia's proven 4D implementation and change management methodology.

4D is a disciplined implementation approach with four defined stages through which Optevia leads an organisation: discovery, design, develop, deploy.



Discovery

Optevia works with its customers in partnership to understand their business, their existing technology environment, and their CRM challenges. Optevia Essentials are used in later stages as pre-built templates to assess requirements.

Design

Implementation commences with a series of workshops leading to the development of prototypes based on Optevia Essentials, in order to agree the requirements specification.

Develop

With requirements, approach and architecture clearly defined, Optevia applies its depth of public sector experience and CRM technical know-how to develop an integrated service orientated solution, with a combination of low risk replicable software Essentials and bespoke development, as necessary.

Deploy

With the appropriate Optevia Essentials and Microsoft Dynamics CRM implemented, Optevia provides change management, technical training and support, help-desk services and systems operations.