CORPORATE AND TRANSACTIONAL

derbyshire partnership forum

Integrating Customer Relationship Management (CRM) to Back Office Systems

Summary

In 2002 the Derbyshire e-Government Partnership received £2m of Local Government On Line (LGOL) grant funding from the Office of the Deputy Prime Minster to develop and implement a range of e-Government solutions.

Customer Relationship Management (CRM) was identified as being key to partners e-Government programmes, and fundamental to the improvement of customer services. A new CRM system was installed at partner sites in March 2004 and is now delivering a wide range of services.

Derbyshire e-Government Partners implemented the CRM system in line with their customer service strategies. In most cases this has led to the development of call centres with dedicated customer service staff.

A 'wide and shallow' approach to service delivery was adopted which enabled the cultural change in the back office to take place whilst allowing the fast deployment of services into the call centre.

Having successfully developed a range of services to a shallow level, partners wanted to take the opportunity to provide deeper integration to the back office to drive out further efficiencies.

A pilot project was undertaken to enable partners to increase their understanding of what is required to successfully achieve a fully integrated front office to back office solution.

Improvement through efficiency

Centre of Excellence
East Midlands

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Project background

Achieving standard integrated processes is complex within the Derbyshire E-Government Partnership because of the range of back office systems that exist. In addition to this, the IT skills required to undertake work of this nature is not widely available and in many partners does not exist at all.

Nonetheless, deep integration from front office to back office systems is the next important step in driving out the full benefits of CRM. Providing end to end integrated processes will help increase the efficiency of call centre agents and provide the extra capacity needed to enable further processes to be introduced into the front office.

Objectives

➔ Provide standards for back office integration within the Derbyshire E-Government Partnership
➔ Identify and provide tools to assist with integration projects
➔ Provision of connectors for the partnership CRM to enable integration
➔ Transfer IT skills from suppliers to partners
➔ Enable additional services to be delivered via partners call centres.

Benefits

Partnership working, a common CRM system and central project management has enabled partners to standardise the technologies to be used. This common approach enables all partners to benefit from the use of a single technical resource. The skills brought to the partnership by external consultants would almost certainly not be affordable on an individual basis by some partners.

Sharing one common CRM enabled the partnership to collectively negotiate a uniformed discounted pricing structure with the supplier, this in turn led to substantial savings when procuring systems and enhancements. On this project a significant saving on the capital purchase of the business connectors has been achieved, which in turn enabled an associated saving on the annual support and maintenance for partners.

Additional benefits of using a single central resource for procurement and legal advice have been realised by partners. Without this collaborative approach LGOL funding would not have been possible.

The pilot has demonstrated how it is possible to integrate the CRM to back office system.

The pilot was a success and one partner is now using the integrated system in their call centre; other partners will follow shortly. Call centre agents are now able to provide several unique services via a scripted process in the CRM without having to have prior knowledge or refer to the back office system.

Call centre agents can now:

➔ Answer Pest Control Queries
➔ Book visit appointments
➔ Process payments
➔ Update the system
➔ Track progress.

The major benefit from this development is that additional processes can be introduced into the call centre without increasing staff numbers.

Skills and learning achieved on this project have been transferred to all partners which results in a more highly skilled workforce and accelerated development.

Quote

"I always thought having to enter information on two systems was wasting time and lengthening the call for the customer. Now I enter the information once and move on to take the next call. I can now concentrate on resolving the customer's query rather than duplicating effort. This is much better for the customer and the advisor."

Angela Leese,
Customer Services Team Leader,
South Derbyshire District Council

Critical success factors

➔ Strong central project management with effective communications network
➔ Clear division of roles and responsibilities between suppliers and partners
➔ Agreed specification of requirements with all parties
➔ Collaborative approach to project by all parties
➔ Suppliers willingness to work with each other
➔ Knowledgeable and skillful external support
➔ Full engagement by senior technical staff at partners
➔ Adequate funding
➔ Adherence to standards.

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Lessons learned / risks

→ **Key Staff:** The success of the pilot was due to the staff working on the project. The contract was agreed on a fixed price basis and the contractor agreed to provide a named consultant for the life of the project. This ensured uniformity and consistency throughout the life of the project.

→ **Software compatibility:** Assurances were given by the suppliers that the different IT systems involved would talk to each other. However, experience has shown that this is not always as easy as suggested.

→ **Technical knowledge:** A lack of skills in using the technologies required to provide integration was an issue within partners. The consultant had to acquire knowledge of a host of back office systems for the collaborative project to succeed. The consultant demonstrated his knowledge through examples of similar projects undertaken in the past.

→ **Financial:** Funding integration projects can be costly. In this initial pilot project the building blocks were laid for future integration projects and this involved the expensive purchase of CRM connectors. The contract for supply of software and services was agreed on a fixed price basis.

Transferability

Principles that can be transferred to other projects:

→ Collective approach to delivering solutions across the partnership
→ Business process analysis skills to enable services to be transferred in to the front office environment.
→ Skills transferred from consultants to partners representatives can be used on future similar projects
→ Small specialised project groups to pilot concepts on behalf of other partners
→ Full documentation from project to assist partners in future projects of this nature.

Summary of benefits

The success of the integration project has increased capacity which will allow further services to be delivered in the call centre by existing staff. Over coming months partners will build on the skills learned to integrate further services and provide greater efficiency.

Role of RCE

With the encouragement and support of the EMCE the Derbyshire e-Government Partnership was able to initiate this project and secure a grant on a match funding basis.

The Programme Manager for the Centre of Excellence provided practical assistance in moving the project forward. This has included the completion of project documentation and always responding promptly to any queries raised.

Call centre operative

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