

# Integrated Customer Management

IT Working Group

**Committee:** IT Working Group  
**Date:** 15 DECEMBER 2005  
**Title:** INTEGRATED CUSTOMER MANAGEMENT  
PROGRESS REPORT  
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**Agenda Item**

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## Summary

This report provides Members with an update on the progress of the Integrated Customer Management (ICM) Project.

## Recommendations

That the content of the report is noted and Members comment on the progress of the project.

## Background Papers

Integrated Customer Management project file.

## Impact

Communication/Consultation	Please refer to paragraph 6 of this report
Community Safety	There are no specific community safety implications contained in this report
Equalities	There are no specific equalities implications contained in this report
Finance	Please refer to paragraph 7 of this report
Human Rights	There are no specific human rights implications contained in this report
Legal implications	There are no specific legal implications contained in this report
Ward-specific impacts	All
Workforce/Workplace	Please refer to paragraph 4 of this report

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### **Situation**

#### 1. Staff Briefings

Staff briefings were held on 5, 6 and 8 December to communicate some important key messages about the ICM project. Staff were informed that: -

- ICM will change the way that the council functions and is organised – it will impact on all staff both front and back office;
- The council is introducing a customer service centre (CSC) in November 2006;
- Work already carried out on the Pathfinders has established that this is the way forward;
- ICM will not stop once we have set up the CSC, it is an ongoing process;
- The CSC will provide broad and deep integration enabling the majority of customer enquiries to be dealt with at the first point of contact;
- The council needs to realise significant budgetary savings in a structured and managed way. ICM will do this;
- The council is committed to moving to a 'cashless' environment;
- There will be a programme of Business Process Re-engineering (BPR) to establish front and back office operations;
- No service will be exempt from the CSC;
- However, the BPR programme will establish those service functions to be part of the CSC.

The briefings also include a demonstration of the Customer Relationship Management (CRM) system. There are also demonstrations of the CRM system starting at 6.30pm and 7.00pm before the council meeting on 13 December 2005.

#### 2. Business Process Re-engineering (BPR) Programme

The work done so far with the Pathfinders has established that we need to do more on BPR. It has therefore been decided to carry out a comprehensive BPR programme across the whole council.

There will be external assistance to lead and start the BPR programme in January 2006. An internal team will be recruited immediately by internal and external advert to assist in the process. The team will be trained through knowledge

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transfer so that they can continue the BPR programme throughout the whole council. Services subject to BPR will also provide specialist support during the exercise.

BPR will eventually be done in all services, but customer-facing services will feature first in the programme. The order of services is: -

1. Revenues and Benefits (including Anti-Fraud) and Cashiers;
2. Housing Services;
3. Development Services;
4. Environmental Services.

Revenues and Benefits (including Anti-Fraud) and Cashiers will start in January and run through to June 2006. It is envisaged that the BPR exercise will take 3-4 months in Housing Services. The BPR programme will continue post CSC implementation date and will be a continuous process.

### 3. Pathfinder Progress

The pathfinders are Dunmow CIC, Environmental Services and Licensing. Sufficient enquiry handling scripts have been written to enable the pathfinders to start. The integration software for Revs and Bens is due shortly, which will enable the CRM system to talk to the back office system. The Ocella system integration for Environmental Services is expected in early January 2006.

The CRM system is being deployed in the Citizens Advice Bureau offices within the district so that CAB advisors can access the system to deal with client enquiries. This project is nearing completion and as soon as the integration software has been implemented, the CAB will soon be able deal with routine enquiries about council tax and benefits without the need to refer clients' to the council.

### 4. Staff Workshops

ICM will impact on everyone within the organisation and HR will be starting 'How does this affect me' workshops this month running into January 2006.

### 5. Location of Customer Service Centre

The options are still being considered but the preferred location is the current reception area. However, the area will require considerable improvement and refurbishment and detailed plans are currently being produced.

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It is also proposed to make improvements to the CIC at Dunmow so that it is more customer friendly.

Discussions are taking place with the library to have a council presence in the town centre.

### 6. Communication and Consultation

An ICM communication and consultation plan is being developed, which will include consultation on the move to a 'cashless' environment.

### 7. Budget

The budget for the project is being closely monitored. The external assistance to start the BPR programme is being funded from the ICM project. However, it is envisaged that this programme will contribute to the efficiency savings emanating from the ICM project.

### **Targets**

8. The customer service centre implementation date of 30 November 2006 remains unchanged.

### **Options**

9. This report recommends that members comment and note on progress of the project.