

Customer Service Principals and the CRM Project

The following Principles are all addressed by the introduction of a Customer Relationship Management System:

a. Customers will receive timely responses

Addressed in the proposed CRM through:

- City of Stirling have noted a 28% reduction in time in investigating for a customer request type, due to the streamlining of the processes, and the removal of paper interactions.

b. Customer interactions will be meaningful

Addressed in the proposed CRM through:

- Customer Portal, that allows for submission and tracking of Customer Requests 24 hours a day.
- An interactive map, that shows current works in their area (including fire prevention works, road works), and customer requests that are active (with no identifying information)
- Actions undertaken can automatically be displayed on the Customer Portal for a Customer Request
- Automated emails and notifications, ensuring residents are kept up to date.
- Online Portal allows for large number of documents to be submitted, without email.
- Transparency with improved statistics
- Full Names and Addresses function, that ensures that duplicates are removed, and that when a resident submits a change of address, it affects all of that resident's interactions with the City of Kalamunda

c. Each customer will be made to feel like the only customer

Addressed in the proposed CRM through:

- Integration with the telephony system allows for the popup of the customers details, and their current items, allowing for quick and full responses over the phone
- CRM functionality brings all of the resident's information together, including Building, Planning, Dogs, Cats, Septics, etc, allowing the resident to be served fully at the Front Counter, or over the phone.
- Transparency created through the Customer Portal
- Different priority levels to different types of requests, assigning an appropriate level of priority to each issue.
- Workflows ensure that a Customer Request goes through the appropriate process, with appropriate escalations where a customer request hasn't progressed.

d. We will help our customers to help themselves

- Customer Portal allows for the submission of Customer Requests and tracking those Customer Requests, 24/7.
- The Customer Portal will be fully mobile responsive, allowing for submissions through mobile phone, using the mobile phone's location to help with the submission of a customer request
- The interactive map will allow for customers to see if there is already an existing customer request, that they can then follow, or submit their customer request on a location.
- Improved online payment options
- Chatbot to allow for residents to ask questions of the website.
- Knowledgebase that is integrated into Dynamics 365, that provides detailed and up to date information, removing the need for a phone call or enquiry.

Our customers are informed and will help inform our services

- Survey functionality within Dynamics 365, that will be part of the finalisation process for a Customer Request
- Knowledgebase that is accessible to residents
- Fully configurable system, with workflows that can change as issues in the process are identified.
- Dynamics 365 allows for building further onto the system, as we identify areas that require improvement.

Focus Areas specifically addressed include:

Communication & Culturea. Be responsive to enquiries & complaints

Measures addressed

- *Monthly ICS Customer Request and Records outstanding* – Improved Reporting, including bottleneck reporting and full-time breakdown.
- *Complaints Handling Reports – outlining process followed, and service area improvements* – Automated Workflow ensures all points of the process are addressed and allows for better notifications to the complainant.
- *Satisfaction with after-hours call service* – Use of Portal will allow the after-hours service to better log calls, and will allow Rangers and other after hours staff full details of the customer request.
- Business Unit cooperation and adherence to Service Level Agreements – Improved reporting, escalation points within the workflow

b. Recognise 'one size does not fit all'

Measures addressed

- *Biennial Community Perception Survey* – Improved method of capture of surveys, to allow for greater slicing of data for improved insights.
- *Customer feedback/compliments on flexible approaches & customised responses and resolutions* – Surveys attached to every Customer Request allow for better tracking of how each type of Customer Request is resolved, and

customer satisfaction. Allows for building the statistical data into full, across the board customer information and issues.

- *Staff utilisation of the checklist* – Automation of workflows to include checklists ensure that information is utilised for each Customer Request type, and that there is a standardisation of customer service to the community
- *Accessibility testing compliance* – Dynamics 365 has excellent accessibility options and will integrate with the overall website accessibility options.

c. Introduce internal communication practices & processes

- *Consistent use of communication templates & tools* – Email and letter templates are part of each Customer Request Type, with automation rules. Knowledge provides information on how to process each Customer Request type, while the Workflow provides a stepped through process for the Customer Request.
- *Staff voluntarily attend training sessions* – Training will be provided for all staff in workshops, with videos and cheatsheets to be made available.
- *Feedback from internal stakeholders* – Rating of each Knowledge article is possible for all staff (as well as residents). A chat functionality allows for cross functional discussions of Customer Requests.

d. Create a Customer Centric organisation

- *All new staff inducted in Customer Service with time spent at contact centre* – New staff will be provided access to the Knowledge articles, videos, and cheatsheets to understand how they should use the system, and also provide them with a broader understanding of their role and how it fits within the organisation.
- *Annual customer service training delivered* – Knowledgebase articles will be able to be tested on, with targeted training based on statistical patterns and identified issues.
- *Customer feedback/working group suggestions adopted* – Improved ingestion of working group suggestions into a reportable system, with Customer Feedback received from an overall and customer request specific basis feeding in.
- *No of customer compliments vs complaints received measured monthly* – Statistical reporting on complaints vs compliments, in addition to survey responses and raised issues will all be able to be reported on.
- *Customer Journey Mapping* – Workflows will be reported on, including bottlenecks, to identify where a customers' requests are breaking down. The CRM will provide an overview of each customer's interactions with the Council, to better understand the customer.

e. Build a 'one team' internal Culture

- *Cultural training delivered* – Training on the CRM will allow the opportunity for full cultural training on staff working towards a customer centric

culture. The Knowledge articles will allow for staff throughout the organisation to respond to basic queries outside of their standard area.

- *Staff survey – staff feel supported and aptly skilled to service customers* – A significant area for staff surveys has been the capabilities of their current systems, and how they are a roadblock to customer service. A full CRM will remove a large number of blockers for staff.
- *Customer Service Champions award program implemented* – Improved statistics will allow for the Customer Service Champion award to better reflect on which staff are upholding the customer first values.
- *Number of cross functional Project Teams formed* – Dynamics 365 will allow for easy communication between teams, especially where multiple teams deal with a customer request. Digitisation of processes will allow for better understanding of what each team does, and how they do it, increasing trust between teams.

Technology

- a. Offer and promote integrated self-service options

Measures addressed

- *No of e-business capabilities enabled through the website* – Customer Portal, interactive map, improved online payment capabilities, knowledgebase
 - *Customer take up of e-business services* – Capability to measure how often Customer Portal, Interactive Map, Online Payments and Knowledge are used.
- b. Make online information available 24/7 and enabled for mobile devices
 - *Online service mobility enabled* – Full mobile app for internal staff, mobile enabled web mobile access for residents
 - *CROs champion development, deployment and usage of mobile devices for staff* – Power users have been identified and will push the use of the mobile capability with field officers.
 - *Consistent intranet and website updates occur simultaneously from a single Corporate Source* – Knowledge allows for updating of both internal and external information, with reminders and escalations to ensure information is kept up to date.
 - *Digital & social media reach & engagement measured monthly* – Dynamics 365 allows for integration with social media, ensuring requests submitted through facebook and twitter are dealt with in the same way as a standard customer request. Reporting on social media requests is in built into Dynamics 365.
 - *Customer feedback on finding information online* – Star rating capability with Knowledge articles, allowing for identification of useful Knowledge information.

- c. Improve on collection and analysis of customer request data

- *Requirements are gathered consistently by Business Analyst from Corporate Systems* – Business Analysis for each process will be undertaken, prior to building Workflows to understand requirements and opportunities to automate.
- *Enablement of automated transactions* – Automation of workflows, to ensure each step is undertaken for a Customer Request. Automated notifications and emails to residents at appropriate points of a Customer Request.
- *Effective customer enquiry and records tracking* – Full statistical reporting on different aspects of a Customer Request, where there are bottlenecks, and how effectively a customer was responded to.
- *CRM Implemented* – Implementation of CRM.