Baw Baw Shire Council resolves more constituent queries first time round

Overview

Country or Region: Australia
Industry: Government

Customer Profile
Located in Victoria, Baw Baw Shire Council employs 300 people, including an IT team of six, to provide services to approximately 40,000 inhabitants across an area of 4000 square kilometres.

Business Situation
Baw Baw Shire Council needed to replace its existing customer access request system to improve first-point-of-contact resolution of constituent requests. By providing an integrated view of each constituent, it wanted to reduce call waiting periods for constituents, provide faster request resolution and expand contact channels.

Solution
The council created its own constituent relationship management system based on Microsoft Dynamics® CRM. It provides an integrated view of constituent property information with contact and request details, enabling the council to standardise processes across its operations to provide more consistent, responsive service.

Benefits
- More responsive constituent service
- Streamlined, consistent processes
- Easy to use with Outlook® integration
- Fewer errors; less duplication of effort
- Highly scalable

> "Our Microsoft Dynamics CRM solution goes way beyond managing constituent requests. In future we'll use it to manage a whole range of services from coordinating volunteers and focus groups to sending SMS reminders to ratepayers – or whatever our community needs."
>
> Phil Stone, Director Planning and Information, Baw Baw Shire Council, Victoria, Australia

When Baw Baw Shire Council decided to replace its existing customer access request system to improve first-point-of-contact resolution of constituent enquiries, it found that no off-the-shelf application could meet its specific needs. So it built its own. Called CouncilRM™, the solution is founded on Microsoft Dynamics® CRM. It brings together constituent request management data with information about properties, roads and council assets to provide a complete picture of constituents and their interactions. Using familiar tools in Microsoft® Office Outlook®, council workers can view constituent contact details and manage requests, emails, appointments and tasks associated with them, simplifying the way they work and helping them respond more efficiently to constituent requests. Specifically designed to integrate local government processes and compliance requirements as well as legacy systems, CouncilRM is now available to other councils.

Microsoft Dynamics®

Situation

With 300 employees and a six-person IT team, Baw Baw Shire Council provides government services for a municipality of approximately 40,000 residents in Victoria, Australia.

To attain the service benchmarks outlined in its strategic plan, Baw Baw Shire Council needed to replace its existing customer access request system. It wanted to improve constituent satisfaction by reducing call waiting periods and helping its people to answer more constituent requests first time. It also wanted to give constituents a greater choice of ways to get in touch with the council. The desired solution would also enable more consistent service by giving every worker an integrated view of each constituent with easy-to-use tools to help them resolve requests rapidly.

Phil Stone, Director Planning and Information at Baw Baw Shire Council, explains: "Everything we do is about people and properties – we needed to manage the workflow and relationship between the entities. We wanted a customer relationship and request management solution that would eliminate duplication across systems and provide an integrated view of all the most important information so our people could focus on our constituents."

Solution

The council started looking for a constituent relationship and request management system to help it meet these challenges. However, it soon discovered that no off-the-shelf software product could meet its specific needs. The available solutions were either too limited in scope, lacked scalability, or simply did not meet the council's business requirements.

Phil Stone says: "No off-the-shelf software could help us deliver on our strategic plan. We needed a much broader picture of constituents and their relationships than any one system could supply. We had to go outside the box."

Phil's team went back to the drawing board. They came up with a revised set of business requirements. On discussing these with their Microsoft engagement manager, Ken Rankins, they realised that a solution based on Microsoft Dynamics CRM would satisfy 85% of their requirements out of the box. The remaining 15% could be customised to meet the council's exact needs.

Inspired, the council decided to build the solution using Microsoft Dynamics CRM. Phil Stone says, "We felt that if we could configure a solution for local government that doesn't just manage requests, but does other things such as manage roads, constituents, volunteers – we would be able to introduce something new to meet a real need in the local government marketplace."

The council IT team worked with consultants from the Microsoft Services team and independent software vendors JayThom and Corporate Strategic Systems to create CouncilRM, a customer relationship and request management solution designed specifically for local government. It provides a unified interface, tools and workflow to make constituent relationship management more efficient, integrating seamlessly with council processes and compliance requirements as well as legacy systems.

After a successful pilot, Baw Baw Shire Council began planning to implement CouncilRM across its operations. While not all features will be deployed immediately, the council plans to use the solution to coordinate volunteers and focus groups, send SMS notifications for rate payments and permit renewals and manage contracts for home and community care. An important next step is to develop an integrated eService Portal providing constituent self-service online.

"The solution is very flexible, so we can start off gradually then switch on new capabilities as we go along," says Phil Stone.

Microsoft®

CouncilRM gives service representatives the full picture when responding to constituent requests by bringing together constituent contact details, including a complete history of their interactions with the council, and real-time data about properties, roads and council assets, including GIS data. Workers can view this information online or via a client within Microsoft Office Outlook that lets them work within the familiar Outlook® interface to coordinate all constituent relationship management workflows. Tasks, letters, faxes, phone calls and appointments all appear automatically in each worker's task list and calendar and are associated with the relevant constituent contact information.

Michael Mills, IT Manager at Baw Baw Shire Council, says, "The solution is very easy to use. On the first day of training, our service representatives showed up thinking they would have to learn a new application. When they realised they'd be working in Outlook they were really pleased. It's a program they already use every day so it doesn't clutter up their desktops with yet another open application window."

Baw Baw Shire Council implemented the standard Microsoft Dynamics CRM Knowledge Base, which provides a library of articles organised by subject – all stored in a single location in a consistent format. Workers can search this treasure trove of relevant information about council services by article number, title, full text, keywords or subject. This enables them to respond rapidly to frequently asked constituent questions.

The solution integrates with other Microsoft software to provide a wealth of productivity-enhancing features. For example, using Microsoft® Office Excel®, council workers can export CRM data as a dynamic worksheet, pivot table or static worksheet and refresh it from a centralised source, ensuring they have the most accurate and recent information to help them make decisions. And with Microsoft® Office Word and Microsoft® Office Publisher they can create letters, mail merges and personalised messages using standard

templates and store their own message templates centrally for colleagues to use.

As well as working seamlessly with council legacy systems, CouncilRM provides deep integration across a range of Microsoft server products, including Windows Server®, Microsoft® SQL Server® and Microsoft® BizTalk® Server. Down the track, Baw Baw Shire Council plans to deploy Microsoft® Office SharePoint® Server to create a constituent self-service portal. Workflows enabled by the Windows® Workflow Foundation work across other Microsoft products, helping to ensure the same consistent and compliant processes as the council expands the solution.

"Our Microsoft Dynamics CRM solution goes way beyond managing constituent requests," Phil Stone says. "In future we'll use it to manage a whole range of services from coordinating volunteers and focus groups to sending SMS reminders to ratepayers – or whatever our community needs."

Microsoft Dynamics CRM also provides multi-tenancy capabilities with advanced data privacy. This opens the possibility for the council to reduce capital costs in future by moving to a shared services model in a hosted environment.

Phil Stone says: "With Microsoft Dynamics CRM, we've built a solution that enables best practice constituent management for local government. And by offering this solution as a shared service, other councils, particularly smaller councils that can't afford to develop their own solutions, can benefit from all the work we've put in."

Because the CouncilRM solution has already been localised for Australian local government environments, other councils won't have to invest heavily in customising it, simplifying deployment and reducing cost.

Michael Mills says: "Usually in local government we're handed a product and told to work our processes around that. This can

Microsoft®

> "Usually in local government we're handed a product and told to work our processes around that. So it was refreshing working with Microsoft because they did it the other way around. They really listened to the business and let us dictate."
>
> Michael Mills,
> IT Manager,
> Baw Baw Shire Council

mean changing the way people work, which takes time and money. So it was refreshing working with Microsoft because they did it the other way around. They asked us what our processes were and worked to that, tweaking their product to make it fit. They really listened to the business and let us dictate. And the result is a solution that's ideal for local government."

Benefits

The solution is already enabling Baw Baw Shire Council to achieve its strategic goal of improving first-point-of-contact resolution for customer requests by putting relevant information at council workers' fingertips.

Faster response times

Council workers now have a single view of each citizen that integrates relevant property and roads-related information with GIS data, as well as a complete history of citizen interactions with the council. This means they're equipped to resolve citizen enquiries and requests on the spot, without having to navigate through multiple tiers of information, making them more responsive.

Fast learning curve

This solution integrates sophisticated constituent relationship management functions into Microsoft Office Outlook with additional folders appearing under Outlook mail folders. This means council workers can continue to manage constituent relationships using the same familiar tool, speeding adoption.

Simpler work processes

Council workers can now manage daily interactions with constituents in a more streamlined manner. They can use Office Outlook to view contact details and manage constituent requests, emails, appointments and tasks associated with each contact. Easy-to-use tools make it simple to create relationships between contacts and businesses or to run outreach campaigns and promotions against contacts and track response rates.

In the know

When constituents first get in touch, workers can check knowledge base articles or constituent history, enabling them to respond instantly to resolve enquiries, increasing constituent satisfaction and productivity.

More consistent service

The solution provides standardised workflows that workers can manage through Office Outlook. For example, requests can be assigned to specific queues to enable faster resolution by the most qualified person. Workers can also set action items and reminders for certain request types, for example, following up a lost dog report or a request to repair a pothole. Requests are automatically escalated if not resolved within a certain time frame. Workers can document and track calls very simply and, if required, convert them into a request complete with a full history. This supports Baw Baw Shire's strategic objective to provide more consistent and responsive service to citizens, no matter how they access council services.

Making more of existing IT

The solution extends the value of the council's existing investment in Microsoft technologies by enabling new capabilities that are fully integrated with existing tools – all without the large set-up costs of competitor solutions. And because the solution is highly scalable, the council can continue to add new capabilities as community needs evolve.

Microsoft®

For More Information

For more information about Microsoft products and services call the sales and information line on 13 20 58 Monday to Friday 8am to 8pm AEST. To find a partner or solution, visit www.microsoft.com/australia/findapartner/

For more information about Microsoft Services products and services, call +61 2 9870 2258 or visit http://www.microsoft.com.au

For more information about Microsoft Gold Partner JayThom Consulting and the consulting services, applications and solutions they deliver, call +61 1300 885 279 or visit http://www.jaythom.com.au/

For more information about Microsoft Gold Partner Corporate Strategic Systems and the consulting services, applications and solutions they deliver, call +61 3 9599 3600 or visit http://www.cssys.com.au/

For more information about Baw Baw Shire Council call +61 3 5624 2411 or visit http://www.bawbawshire.vic.gov.au/

Flexible mobile options

Council field workers don't yet have wireless access to the solution. However, they can update records offline on Tablet PCs and upload them when they're next connected to the network, giving them more complete and accurate information in the field and making them more productive.

More accurate data

The solution provides constant two-way synchronisation between Microsoft Dynamics CRM and the council's legacy systems. All data is checked for duplicates as new contacts are created to help ensure data integrity.

Microsoft Citizen Service Platform

The Microsoft Citizen Service platform comprises the IT infrastructure and applications local councils need to help improve services. It enables you to take a phased approach to introducing solutions, such as case management, enterprise content management, flexible and mobile communications, performance reporting and more.

Microsoft interoperability and support for standards enables you to leverage partner solutions, your existing systems, and connect to other government organisations to share services and data.

Many capabilities are provided by standard products. However, we also provide templates based around Microsoft Office SharePoint Server and Microsoft Dynamics CRM to deliver specific local government solutions.

For more information, visit
www.microsoft.com.au/government

Software and Services

- Microsoft® Office System
- Microsoft® Office Outlook®
- Microsoft Dynamics® CRM
- Microsoft® SQL Server® 2008
- Microsoft® Exchange Server

Partners

- JayThom
- Corporate Strategic Systems

Microsoft®