



City Council uses CRM to Improve Community Services

Overview

Country or Region: Australia

Industry: Local government

Customer Profile

Wyndham City Council has 950 employees looking after a range of community services, including youth and social services, cultural activities, sport and recreation, tourism and business services.

Business Situation

The council used different systems to book events. Because there was no automatic duplication between systems, customer details were sometimes incorrect or out of date.

Solution

Customer details were centralised on Microsoft Dynamics® CRM, accessed through Microsoft Outlook on Microsoft Exchange Server® 2007. A Microsoft SQL Server® 2005 provided a single database.

Benefits

- Improved customer service
- Better able to serve the community
- Improved communication
- Scalability for growth

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Scott Walker, Manager, Information Systems, Wyndham City Council

Located south-west of Melbourne, Wyndham City Council manages one of Australia’s fastest growing and most diverse communities. To manage resident and customer enquiries, the council used a variety of different systems, depending on the department. However, because names and customer details were entered by hand on each different system, there were often errors or inconsistencies which caused inconvenience. In 2009, the council deployed Microsoft Dynamics® Customer Relationship Management (CRM) to manage both its bookings and numerous customer services. The CRM is customised to handle the council’s many business functions and offers an easy-to-use centralised portal for all employees. It has improved the council’s ability to provide professional services to the community and target its communications to particular sets of residents and customers.



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Situation

Wyndham City Council was established in 1862 as the local governing body for a large coastal area surrounding Port Phillip Bay in Victoria. Today the community has major industrial and commercial business sectors, as well as a growing tourism industry. With a population of 143,000, the city is expected to double in size by 2026.

The council employs approximately 950 people to help manage and serve the local community. Services include sport and recreation, cultural activities, tourism, and youth, business and social services.

Wyndham City Council had used Lotus Notes as its primary mailing and administration platform for ten years. However, different departments within the council each had customised versions of applications on this platform, such as facilities booking systems.

“The problem with our existing system was that each team had their own individual applications which contained customer information,” explains Scott Walker, Manager, Information Systems, at Wyndham City Council. “We had 30 separate databases and no clarity around what was up to date or if the right information was being used in the right circumstance.”

For example, a local school principal may be an enrolled voter, the treasurer of the rotary club and cricket club president. This type of information was dispersed across numerous council databases in Lotus Notes, which affected the organisation’s mailing process because names and addresses in the databases were inconsistent.

“Mail was being sent to residents who hadn’t lived at an address for two years,” says Walker. “In some cases, the kids had graduated from high school but their parents were still being sent correspondence about an upcoming children’s holiday program. We needed to improve the accuracy of our services.”

Similarly, event bookings at council venues were logged by users from different departments on local ad hoc spreadsheets. Updates were poorly communicated and duplications were commonplace. This breakdown in communication was causing inefficiency throughout the council and curtailing its ability to meet customers’ and residents’ requests.

Solution

In February 2009, Wyndham City Council met with Microsoft Gold Partner JayThom to discuss options for a new administration and booking system. Because the council was moving its email to Microsoft Outlook and was already using Microsoft Office, JayThom recommended a Microsoft Dynamics customer relationship management (CRM) system, which could be specifically customised to work with these programs.

“Once we went through the review process, we knew the CRM system was the ideal solution,” says Walker. “It offered us the chance to customise the system to our way of doing things instead of using an off-the-shelf product. We could have a single workspace with access to all council data. Information that was spread across several databases – such as the different roles of a local school principal – could be presented in a single screen display using the CRM system.”

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Having decided to proceed with Microsoft Dynamics CRM, JayThom examined the council’s precise needs using the Microsoft Dynamics Sure Step methodology. This ensured each phase of the upgrade was mapped and that the customisation met council expectations.

“Our initial consultations with the council were important because we identified how we could best configure the CRM system to its lines of business,” says Brett Yorgey, Director of JayThom. “They liked the idea of the CRM environment because currently much of their admin was hidden away in folders. The CRM system would allow them to search and find information quickly.”

Microsoft SQL Server 2005 was also installed as the council’s database platform and Microsoft Windows Server 2008 was added so that the Active Directory feature could manage staff logons and system security. Lastly, the council set up Microsoft Exchange Server 2007 and linked it to Microsoft Dynamics CRM. As a result, all the contact details and roles of a community member are viewed in a single area and can be accessed directly from Microsoft Outlook.

The council gave JayThom a three-month deadline to deploy the new system and migrate all existing data. Named CouncilRM, the new system went live on time in July 2009.

Benefits

The council’s new Microsoft Dynamics CRM system has improved communications and bookings processes, so that it can offer a faster, more professional service to residents and customers.

Improved customer service

The CouncilRM system gives staff a process for updating the council’s database and in turn, improve the quality of information it provides customers.

“We used to make updates infrequently and on an ad hoc basis,” says Walker. “Now if a customer’s details change, the change is entered once and it is visible to all staff throughout the council. It just means our service is faster and more accurate.”

“Our staff can access information from anywhere in the business at the touch of a finger,” adds Walker. “It was previously only accessible to those people maintaining specific records. With CouncilRM, we’re all on the same page.”

Additionally, the CRM system provides a single view of Wyndham City’s community members. When a school teacher is also a sports club president, for example, this information is located in a single directory.

“We are giving a better account of ourselves, as well,” says Walker, “because we aren’t sending out irrelevant information anymore.”

Better able to meet community needs

The CouncilRM system also offers employees the ability to make far better use of the information. Staff can create customised searches and reports, which are especially beneficial if the council is trying to communicate with specific industries or targeting groups with important information.

“If someone wants to know all the school principals in the area, you can do a search that gives them every high school and relevant contacts,” says Walker. “You

For More Information

For more information about Microsoft Dynamics products and services, call 1800 197 960.

To access information using the World Wide Web, go to:
www.microsoft.com/australia/dynamics/

For more information about JayThom products and services, call 0417 354 493 or visit the Web site at:
<http://www.JayThom.com.au>

For more information about Wyndham City Council products and services, call 03 9742 0924 or visit the Web site at:
<http://www.wyndham.vic.gov.au>

can then save that search as 'secondary school principals' and access it later under a saved searches link."

Sending bulk information to sub-groups is also easier. Previously, staff constructed special versions of spreadsheets to target particular sets of contacts, and then sent mail to each of the names. With CouncilRM, staff can mail-merge, entering a search criteria then dispatching mail automatically to all the names that appear. Employees can also keep track of booking changes.

"Casual and season bookings used to look the same," explains Walker. "Now we can define booking types, obtain a better view of vacancies and annotate tentative bookings."

Platform for growth

The new CRM system also supports SMS messaging and Twitter, and the council is examining how these could be used for communicating with specific groups in time-critical situations.

"If, for example, we have an area that is at high risk of bush fires, we could push out highly targeted up-to-the minute information, perhaps to douse the house, or evacuate," says Walker.

Another option for the council is using Twitter for events notifications. The council recognises that mail drops are not the best way to communicate with the digital generation, and is developing

a set of protocols to guide future digital communications.

"We're still learning all the different things the CRM system can do but we know we're on a winner," says Walker. "You can't put a dollar figure on the credibility this system gives us. And because it's customised to our business we can develop it in whatever direction we need."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:
www.microsoft.com/dynamics

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 - Exchange Server 2007 Standard Edition
 - Microsoft SQL Server 2005
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- Microsoft Office
- Microsoft Dynamics CRM 4.0

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