

## CONNECTS CUSTOMER FIRST GROUP

11<sup>th</sup> May 2010

### CRM Development Proposals

#### 1. Purpose of the Report

- 1.1. To report back to the CRM Support and Development Group on the outcome of the special meeting of the CCFG held on 11<sup>th</sup> May 2010, during which the business cases for initial CRM development work were considered and prioritised.

#### 2. Recommendations of the special meeting of the CCFG

- 2.1. That detailed work to scope and produce functional specifications for the four pieces of work detailed below commences immediately to quantify them in more detail in terms of time and resources required. These pieces of work are (in no particular order or priority):

- i. **Auto Population of service request attributes (MULTI007)** Auto population of service request attributes with information stored within party interests, the information being pulled through being mapped to the service request type
- ii. **Calendar Enhancements (MULTI001, MULTI008, SoTCC007)** Enhancements to calendar functions, including:
  - Cancelling the task that created the original appointment within CRM, leaving the service request open
  - Cancelling the appointment originally booked, along with the service request, having a status of 'cancelled by user'
  - Cancelling and re-schedule the original appointment
  - Allowing CRM to determine and book the next available slot within the calendar for a particular resource
  - Allowing a customer services advisor to override the originally booked appointment, manually selecting another slot
  - Ensuring that any cancelled slots appear as a free slot within the calendar
  - Allowing access to the same calendar by multiple users at the same time
  - Allowing a service request to support multiple calendars for differing resources
  - Giving service requests the ability to support calendars for multiple resources e.g. white goods vans, garden refuse vans, pest control operatives to enable complex booking requests to be handled by a single service request and to enable service request types to be reduced
  - To provisionally block out slots on a resource calendar via the use of a service request

- iii. **Bartec Integration (MULTI009)** Development of two-way link between CRM and the Bartec in-cab system in order to provide the ability for CRM to provide real-time details to refuse crews of problems reported in the contact centre. Additionally, for the Bartec in-cab device to update or close service requests and ultimately for these devices to raise a service request which is then populated within CRM
  - iv. **GIS Integration (MULTI014)** Development of a common set of output parameters e.g. service request type, UPRN, Eastings or Northings that CRM could use to identify locations on the GIS system. Conversely, a set of parameters would be required to feed information back to CRM about the location of particular problems or incidents that are not necessarily property or person specific e.g. the location of a fly-tipping incident
- 2.2. That the day to day management of these pieces of work now becomes the responsibility of the CRM support and Development Group, with highlight reports being brought back to the CCFG on their progress.
- 2.3. That as and when further business cases are received, these are reviewed by the CCFG to assess their impact on the development plan in progress at that time and to allocate them a provisional slot on the development plan
- 2.4. That, subject to progress in relation to the initial pieces of development work, the remaining pieces of development already approved are completed in accordance with the broad timescales outlined at **Appendix A**.
- 3. Detail**
- 3.1. A final list of developments was drawn up and proposed by the CRM Support and Development Group at its meeting on 24<sup>th</sup> March 2010. At that meeting, the group proposed that pieces of development work should be put forward for consideration by the CCFG on the basis of the following criteria:
  - i. The development was of interest or benefit to more than one partner, or
  - ii. One partner had submitted the request and had indicated that non completion of the development work would have a detrimental impact on the operation of one of their services currently delivered by CRM
- 3.2. On this basis, partners were asked to prepare business cases for development work that met these criteria. A total of 11 pieces of work were identified and business cases submitted by partners. These were subsequently quantified as far as possible at a high level by developers within the core team.
- 3.3. These quantified business cases were presented and considered at a special meeting of the CCFG on 11<sup>th</sup> May 2010. At this meeting, the four pieces of work detailed at 2.1 were identified as being a high priority and the group decided that further detailed work should start immediately to progress these. This work should comprise the production of functional and technical specifications to further scope the development and to produce more accurate information about timescales and resources.
- 3.4. A number of other business cases were also considered and approved. Due to the fact that these additional developments were not considered as being of such high priority, they were loosely scheduled for later on in the year, their exact start dates being determined by the latest date in which to complete them to meet their

implementation deadline and the progress of the higher priority developments. The exact timings would be refined following the detailed work in relation to the four priority pieces of work.

- 3.5. Business cases for the remaining development work that has already been identified, but which at the moment falls outside of this initial phase of development would continue to be worked up in order that they are ready for progression at the relevant time.

#### **4. Conclusions**

- 4.1. The process that has been completed so far has resulted in the production of a draft CRM development plan that has identified some priority pieces of development work, along with approximate timescales for their completion. This will be further refined to take into account changing priorities and additional pieces of development work that are subsequently identified. This will follow the processes that have been established for requesting development work and detailed at **Appendix B**

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APPENDIX A – DETAILS OF DEVELOPMENT REQUESTS SUBMITTED

Ref No	Description	Date Approved by CCFG	Earliest Start Date	Notes
ESBC008/ MULTI007	Auto-population of service request attributes with party interest information	11/05/2010	June 2010	Priority Development – exact start date of this development will be defined following completion of functional specification
LDC004	Integration between CRM and Fix My Street website	11/05/2010	January 2011	
MULTI001 MULTI008 SoTCC007	Re-scheduling of calendar appointments Service requests that support multiple resource calendars Block bookings within calendars	11/05/2010	June 2010	Priority Development – exact start date of this development will be defined following completion of functional specification
MULTI009	Integration between Bartec in-cab system and CRM	11/05/2010	June 2010	Priority Development – exact start date of this development will be defined following completion of functional specification
MULTI014	Development of a common set of parameters to enable integration between CRM and GIS applications	11/05/2010	June 2010	Priority Development – exact start date of this development will be defined following completion of functional specification
ESBC003	Statutory report for noise complaints	11/05/2010	December 2010	
ESBC007	Pollution control permitting processes	11/05/2010	December 2010	
LDC001	Change of circumstances processes in relation to food inspections	11/05/2010	November 2010	
MULTI013	Remote and mobile working	11/05/2010	August 2010	
<b>Developments yet to be approved (business cases required)</b>				
CCDC001	Implementation of housing end environmental health processes	Yet to be approved	Yet to be determined	
CCDC002	Implementation of out of hours and civil contingencies processes	Yet to be approved	Yet to be determined	

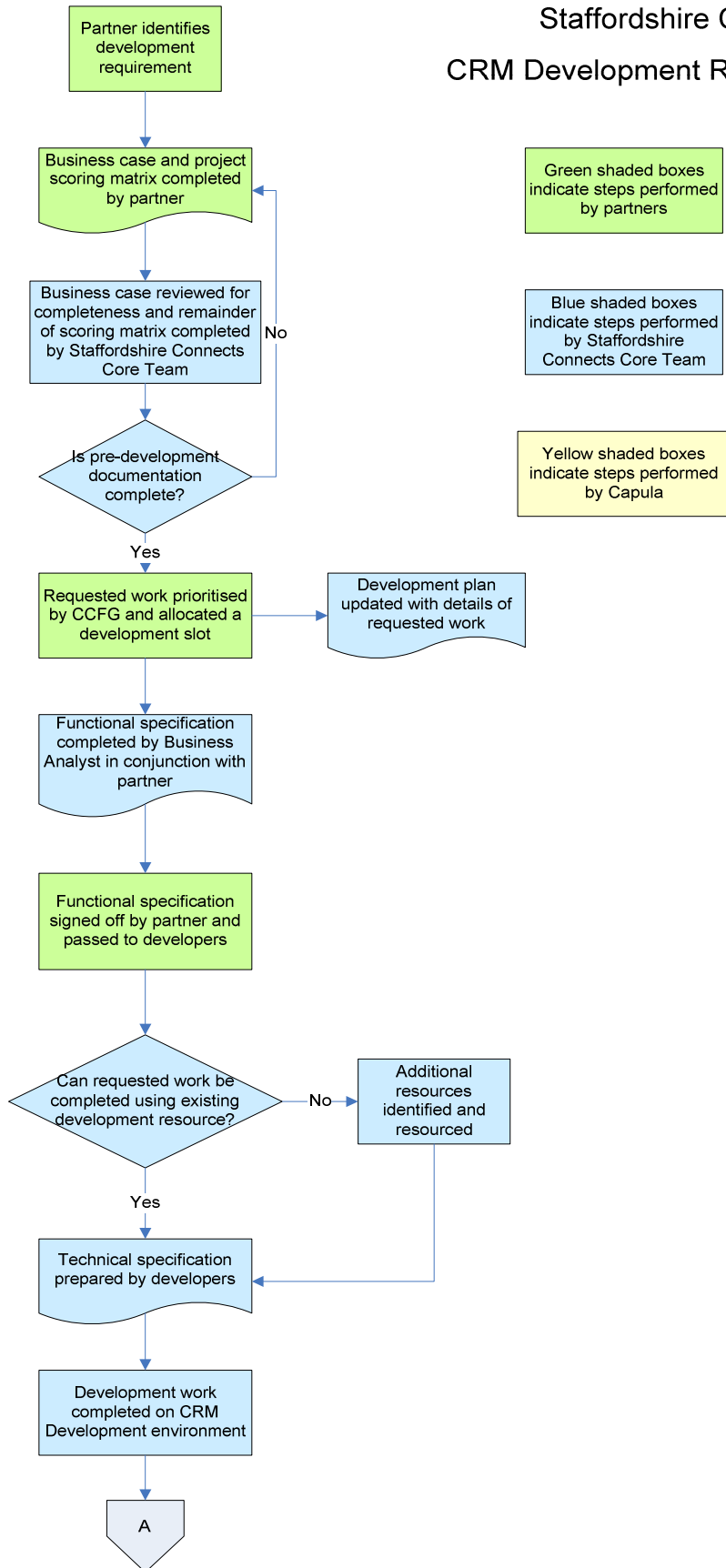
APPENDIX A – DETAILS OF DEVELOPMENT REQUESTS SUBMITTED

Ref No	Description	Date Approved by CCFG	Earliest Start Date	Notes
CCDC003	Mobile working (specifically for waste management)	Yet to be approved	Yet to be determined	Could potentially be delivered by MULTI013 (dependent upon exact context of work)
CCDC004	Escalation processes	Yet to be approved	Yet to be determined	
ESBC006	Health and Safety risk rating	Yet to be approved	Yet to be determined	
LDC002	Additional functionality and service requests for food inspections	Yet to be approved	Yet to be determined	
LDC003	Bus pass and blue badge applications	Yet to be approved	Yet to be determined	
MULTI002	Service request to process change in circumstances	Yet to be approved	Yet to be determined	
MULTI003	Development of a custom button to generate and preview a mail-merge document	Yet to be approved	Yet to be determined	
MULTI004	Web form development (exact details to be specified)	Yet to be approved	Yet to be determined	
MULTI005	Implementation of a business rule to automatically close a service request	Yet to be approved	Yet to be determined	
MULTI006	Self-maintenance of party interests	Yet to be approved	Yet to be determined	
MULTI010	LAE1 report for health and safety	Yet to be approved	Yet to be determined	
MULTI011	Integration between CRM and partner telephony systems	Yet to be approved	Yet to be determined	
MULTI012	Development of additional management information reports (exact details to be specified)	Yet to be approved	Yet to be determined	
NBC002	Integration to back office systems (exact details	Yet to be	Yet to be	

APPENDIX A – DETAILS OF DEVELOPMENT REQUESTS SUBMITTED

Ref No	Description	Date Approved by CCFG	Earliest Start Date	Notes
	to be specified)	approved	determined	
SMDC001	Changes to housing benefit calendars	Yet to be approved	Yet to be determined	
SoTCC001	Implementation of the anti-social behaviour reporting processes	Yet to be approved	Yet to be determined	
SoTCC002	Changes to the notification for the Emergency Duty Team	Yet to be approved	Yet to be determined	
SoTCC004	Duplicate checking for service requests	Yet to be approved	Yet to be determined	
SoTCC005	Condition based tasks (exact details to be specified)	Yet to be approved	Yet to be determined	
SoTCC006	Development of a mechanism to record the location of a problem or incident	Yet to be approved	Yet to be determined	

## Staffordshire Connects CRM Development Request Process



## APPENDIX B – DEVELOPMENT REQUST PROCESS

