

## CRM Support and Development Group Work Plan - Progress Report

Version 6.0 (May 2010 )

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 1 - Maximising CRM Functionality</b>					
<p><b><i>Identification and sharing of good practice in relation to maximising the potential of the CRM application</i></b>            Research partner development and CRM services to identify:</p> <ul style="list-style-type: none"> <li>• Development that could be re-used or adopted by other partners in the same or other contexts</li> <li>• Generic functionality that could be replicated in order to minimise</li> </ul> <p>Devise mechanism to enable partners to showcase development work they have undertaken</p> <p>Investigate and disseminate the additional potential of the R12 environment</p> <p><b>LEAD:</b> No lead authority required – to be managed as part of group activities</p>	Business Analyst  Senior Oracle Support Engineer	<ul style="list-style-type: none"> <li>• Likely to be funded from within current costs</li> </ul>	<ul style="list-style-type: none"> <li>• Distributed functionality matrix from CCFG workshop held in March 2009</li> <li>• Distributed initial version of skills matrix</li> <li>• Skills matrix circulated to all partners for completion by 20.01.10</li> <li>• Skills matrices have now been received from 5 partners (CCDC, ESBC, SBC, SMDC and SoTCC) Completed Skills matrices have still to be received from LDC, NBC, SSDC and TBC</li> </ul>	<ul style="list-style-type: none"> <li>• The information received from partners to date to be compiled</li> <li>• Identify areas where partners need support and put in touch with partners who can provide this support, or arrange for support to be provided through the core team</li> <li>• Identify areas where demonstrations can be carried out as part of CRM Support and Development Group meetings and build into agendas for future meetings</li> </ul>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 2 - Benchmarking</b>					
<p><b><i>Benchmarking and Liaison with other Oracle CRM users</i></b>            Identification of areas where potentially Staffordshire Connects could link with other Oracle CRM users to share previous or forthcoming development</p> <p><b>LEAD:</b> No specific lead required</p>	Business Analyst  Senior Oracle Support Engineer  Partner Representatives	<ul style="list-style-type: none"> <li>Likely to be funded from within current costs</li> </ul>	<ul style="list-style-type: none"> <li>Details of UKOUG circulated to group members so that they can register for events/meetings etc.</li> <li>The most recent UKOUG Meeting took place at the Oracle Solihull offices on 28<sup>th</sup> April 2010. As well as the Core Team attending, representatives from LDC and CCDC also attended</li> </ul>	<ul style="list-style-type: none"> <li>Following up on strategic work to explore the potential for a regional Oracle user group, identify areas where this group could link into any regional group that is established</li> <li>The next meeting of the UKOUG is scheduled for 20<sup>th</sup> October 2010, taking place again at Oracle's offices at Blythe Valley in Solihull. As part of the partnership's membership, partners are each entitled to send representation.</li> </ul>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 3 - CRM Development Path</b>					
<p><b><i>Practical considerations relating to the progression to the eventual successor to the LG45 product</i></b></p> <p>Identification of the technical considerations and resources required in order to effectively plan for the successor to LG45 at the end of the current contract period</p> <p>Establish the extent to which current CRM meets partners' needs and what would be expected of its replacement</p> <p><b>LEAD:</b> Staffordshire Moorlands District Council</p>	<p>Business Analyst</p> <p>Senior Oracle Support Engineer</p> <p>Oracle Applications Developer</p> <p>Partner Representation</p>	<ul style="list-style-type: none"> <li>The planning process can be met from within existing budgets</li> <li>The actual migration will require funding as part of a specific project</li> </ul>	<ul style="list-style-type: none"> <li>Initial meeting of the sub group to start scoping the work has taken place</li> <li>Draft scoping document produced, which will be reviewed and amended following strategic discussions and decisions</li> <li>Group have decided to wait until strategic discussions with partners have been completed and the strategic plan for CRM has been decided before commencing any specific work</li> </ul>	<ul style="list-style-type: none"> <li>A report on the proposals for the ongoing support and development of the CRM Support and Development function is being presented to the Strategic Advisory Board on 10<sup>th</sup> June 2010</li> </ul>	<p>Status to remain at amber pending decisions and feedback from SAB</p>

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 4 - Partner Development Priorities</b>					
<p><b><i>The prioritisation and management of partner's development requirements</i></b></p> <p>Identification of partner priorities to form a development plan for the CRM</p> <p>Differentiation between development work and routine maintenance e.g. change requests</p> <p>Devise a mechanism for the prioritisation and resourcing of development work</p> <p>.</p> <p><b>LEAD:</b> Once devised, management of the development plan will remain within the Core Team</p>	<p>Business Analyst</p> <p>Senior Oracle Support Engineer</p> <p>Oracle Applications Developer</p> <p>Partner Representation</p>	<p>Likely to be funded from within existing costs unless specific pieces of work require the use of external resources</p>	<ul style="list-style-type: none"> <li>• Definition agreed on what constitutes a change and what is to be classed as development work</li> <li>• Partner 'wish list' for development work distributed for comment and agreement as a baseline</li> <li>• Business case document and scoring matrix devised for quantifying development requirements</li> <li>• Process for the submission and approval of development requests devised</li> <li>• Development request process and documentation trialled by East Staffordshire Borough Council. Further trials to be undertaken by Lichfield District Council and Tamworth Borough Council</li> </ul>	<ul style="list-style-type: none"> <li>• Formulate development plan for CRM development work based upon partner matrices and work that has already been identified by partners</li> <li>• Development list to be approved and prioritised by the CCFG (list and business cases required)</li> <li>• Produce generic documents for ( technical specification, test specification)</li> <li>• Devise mechanism and management arrangements for ongoing management of the development plan via the CCFG</li> <li>• <b>Preparation of functional and technical specifications for the high priority pieces of work approved by the CCFG on 11.05.2010</b></li> <li>• <b>Ongoing progress reports to be prepared for submission to the CCFG</b></li> </ul>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
Workstream 4 - Partner Development Priorities (Continued)					

			<ul style="list-style-type: none"><li>• Development requirement matrix circulated to partners on 12<sup>th</sup> January 2010, along with details of known developments. Partners to return completed matrices by 29<sup>th</sup> January 2010.</li><li>• Development requirements received from CCDC, ESBC, LDC, NBC, SMDC, SoTCC Development requirements not yet received from SDC, SSDC and TBC</li><li>• Generic template for functional specification produced and circulated to partners</li><li>• Business cases supplied by the required date of 23<sup>rd</sup> April are being presented to the CCFG at a special meeting on 11<sup>th</sup> May 2010</li><li>• Draft development list agreed by the on 11.05.2010 based upon the business cases submitted</li></ul>		
--	--	--	---	--	--

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 5 - CRM Training and Materials</b>					
<p><b><i>Ensuring that partners have access to up-to-date and comprehensive training materials and facilities in relation to the use and development of the CRM</i></b></p> <p>Identification of partner's training needs and how current documentation and facilities fulfil those</p> <p><b>LEAD:</b> Stoke-on-Trent City Council, Cannock Chase District Council and South Staffordshire District Council</p>	<p>Business Analyst</p> <p>Partner Representation</p>	<p>Likely to be funded initially from within existing costs</p> <p>Funding in relation to bespoke or specific training needs provided by external suppliers will be identified and costed specifically (where relevant)</p>	<ul style="list-style-type: none"> <li>• Task group have held initial meeting to scope work required</li> <li>• Scoping document produced and signed off</li> <li>• Current CRM training materials under review for suitability and to identify any gaps</li> <li>• Customer Service Advisor user guide and Service Request Administrator guide updated. Currently under review by the task group</li> <li>• Comments received from task group on CRM service request administrator and customer services advisor user guides</li> </ul>	<ul style="list-style-type: none"> <li>• Incorporate feedback from task group members into user guides</li> <li>• Publish user guides to the Staffordshire Connects web portal</li> <li>• Identify gaps and produce documentation to fill these</li> <li>• Base around tasks rather than specific services i.e. keep as generic as possible</li> <li>• Look at how the training environment can be best used to meet partner needs</li> <li>• Run workshops in relation to newly developed material</li> <li>• Make training materials available online</li> <li>• Investigate potential for online training courses</li> </ul>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 6 - Change Control Process</b>					
<p><b><i>An effective mechanism for the management of ad-hoc changes to existing processes and functionality on behalf of partners</i></b></p> <p>Define what constitutes a change request</p> <p>Develop a mechanism for the prioritisation of changes</p> <p>Review of processes and documentation</p> <p>Identification of areas where partners can become more self sufficient</p> <p>Protocols for releasing code onto the CRM production environment</p> <p><b>Lead:</b> Staffordshire Connects Core Team</p>	<p>Business Analyst</p> <p>Senior Oracle Support Engineer</p> <p>Oracle Applications Developer</p> <p>Capula</p>	<p>To be met from within existing budgets</p>	<ul style="list-style-type: none"> <li>• Definition of what constitutes a change agreed and adopted</li> <li>• Service request definition document updated</li> <li>• Revised change request process and documentation adopted by partners, Core Team and Capula</li> </ul>	<ul style="list-style-type: none"> <li>• <b>COMPLETED</b> Ongoing review of process</li> </ul>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 7 - CRM Development Platform</b>					
<p><b><i>Identification and implementation of effective arrangements for the use of a CRM development platform that meets the needs of both the Core Team as well as partners</i></b></p> <p>Review of the current arrangements for the use of the CRM development platform</p> <p>Identify requirements from both partner and core team perspectives</p> <p><b>Lead:</b> Staffordshire Connects Core Team</p>	<p>Senior Oracle Support Engineer</p> <p>Oracle Applications Developer</p> <p>Capula</p> <p>Partner Representation</p>	<p>Likely to be met from within current costs</p> <p>Costs associated with any additional hardware or upgrades to existing hardware to be supported by a business case</p>	<ul style="list-style-type: none"> <li>This piece of work looking at separate development platforms for the Core Team and partners is likely to commence when the Technical Manager position within the Core Team has been filled</li> <li>Interim arrangements in place. An R12 development platform that is shared between the Core Team and partners is now in place and available for use. This replicates the arrangements that were in place prior to the upgrade to CRM version 12</li> </ul>	<p><b>COMPLETED</b> No further work identified at this stage</p>	

Area of Work - Detail - Lead	Resources	Budget	Progress to Date	Forthcoming Activity	Status (RAG where underway)
<b>Workstream 8 - CRM Documentation and Administration</b>					
<p><b><i>Identification and definition of the requirements for the secure storage of CRM related documentation</i></b></p> <p>Ensuring that CRM related documentation (SRTD documents, code releases, training materials etc.) is maintained and stored securely</p> <p><b>LEAD:</b> Staffordshire Connects Core Team</p>	<p>Senior Oracle Support Engineer</p> <p>Oracle Applications Developer</p> <p>Capula</p>	<p>Due to alternative solution being identified, this piece of work no longer has any specific funding requirements and can be accommodated within existing resources</p>	<ul style="list-style-type: none"> <li>• CRM related documentation e.g. technical specs, SRTD documentation has started to be migrated to VSS storage on Staffs Connects local network</li> <li>• E-mail server identified as a location for VSS storage as a result of sufficient capacity (instead of purchasing a small capacity server for this purpose). This VSS will be accessible to both Capula and the Core Team</li> <li>• Availability of development platform communicated to partners</li> <li>• Capula and Core Team now have access to VSS storage created on the e-mail server and documentation is in the process of being migrated.</li> </ul>	<ul style="list-style-type: none"> <li>• Devise processes for the ongoing management and maintenance of documentation</li> </ul>	