
**CUSTOMER RELATIONSHIP MANAGEMENT AND SAP SYSTEMS: PROGRESS
UPDATE**

Reason for this Report

1. To provide the Committee with an update in respect of progress in applying enabling technology to improve efficiencies in delivering customer services.

Background

2. The Committee has responsibility within its terms of reference for scrutiny of the Council's management of its performance and improvement, and specific responsibility for scrutiny of e-government and ICT, contact centre services and service access.
3. In January 2017, the Committee received a progress report on the Organisational Development Programme. The Committee commended the Council on the generally strong progress it was making in responding to the Wales Audit Office Corporate Follow-On Report. However, Members' attention was drawn to ongoing performance issues with the Council's Customer Relationship Management (CRM) system, affecting both the roll out of Phase 1 and the development of future phases.

4. The Committee therefore, in its letter to the Cabinet, requested an update on progress made to resolve the technological issues that would enable improvement in customer focussed online services.

Issues

5. Central to the Council's improvement is the Organisational Development Programme (ODP). The ODP is comprised of two portfolios (the Reshaping Services Portfolio and the Enabling and Commissioning Portfolio). Each portfolio contains multiple projects that address a range of issues identified in the Council's Follow-on Statement of Action, developed in response to the WAO Corporate Assessment.
6. The *Reshaping Services Portfolio* exists to explore enabling technologies, and develop working practices to facilitate the reshaping of key services across the Council. The aim is to better understand and manage customer demand, re-align services and functions currently delivered across a number of service silos, and deliver services at a reduced cost so that they are sustainable within the tough financial climate.
7. A strand of the Reshaping Services Portfolio is the *Customer Focus & Enabling Technology programme*. Enabling Technology is defined as 'establishing and exploiting standardised technology across the Council to improve efficiencies and maximise the capture and use of customer data'. The aim is to drive down the cost of delivering services, improve the quality and consistency of customer service, and eliminate unnecessary duplication of effort through a rigorous integration of "back office" processes.
8. A key project of the Customer Focus and Enabling Technology Programme is the *Online Services (CRM & Web) Project*, on which the Committee has requested a progress update.

Previous scrutiny

9. In November 2016, following scrutiny of the WAO Statement of Action, the Committee noted that the Council could not deliver a customer portal until the digitalisation issues currently experienced by C2C operators were resolved, indicating an intention to keep a close eye on developments. Members had also indicated to the Leader their frustration that the Council was not further ahead in resolving the technological integration of the Council's SAP system with the customer facing system, CRM.

10. Following scrutiny of the Customer Services Strategy in December 2016, the Committee noted that the Council could not deliver a customer portal until the digitalisation issues currently experienced by C2C operators were resolved. Members heard that complex digital stories are developing, and that resolving the link between SAP and CRM will create the potential to link cameras, in-car technology and C2C. Members therefore re-iterated that the Council should have a date in mind as to when the problem would be resolved, and requested an update on CRM/SAP when there was something significant to report back.

11. Following its scrutiny of the ODP progress in January the Committee expressed concern that the CRM technological difficulties the Council had faced for some time remained unresolved. Members were seeking tangible progress in resolving the technological issues that would enable improvement in customer-focussed online services.

12. Having been advised on three occasions that the Council's technology partner has put in place its global escalation team to resolve matters, the Committee noted that the findings of the team's investigations and analysis were to be reported upon shortly, and stressed that the matter required resolution. To that end, the Chair would request an update on CRM at Committee's 14 March 2017 meeting.

Way Forward

13. Councillor Graham Hinchey (Cabinet Member for Performance & Resources) has been invited to attend for this item.
14. Paul Orders (Chief Executive), Christine Salter (Corporate Director Resources) and Sarah McGill (Director of Communities, Housing & Customer Services) will be in attendance to update the Committee.

Legal Implications

15. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

16. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct financial implications at this stage in relation to any of the work programme. However,

financial implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any financial implications arising from those recommendations.

RECOMMENDATION

17. The Committee is recommended to note the report and the information provided at the meeting, consider whether it wishes to refer any comments or concerns to the Cabinet, and whether it wishes to commend further scrutiny to its successors in the forthcoming administration.

DAVINA FIORE

Director of Governance & Legal Services
8 March 2017