Article of: Director of Housing and Inclusion

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SUBJECT: REPLACEMENT CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM – SERVICENOW

Wards affected: Borough wide

1.0 PURPOSE OF ARTICLE

1.1 To update Members on the implementation of the replacement Customer Relationship Management (CRM) system.

2.0 BACKGROUND

2.1 In 2016, Members approved Capital funding to enable the Council to implement a replacement CRM and compatible telephony system.

2.2 A market appraisal of suitable products, based on value for money and functionality that would meet the Council's requirements for a replacement CRM and telephony system, was subsequently conducted by BT Lancashire Services (BTLS), our ICT provider. During the market appraisal exercise, the current "Front Office CRM" provider, Northgate Public Services, advised that they would cease development and support of all Front Office products from April 2018.

2.3 A Project Board which includes Officers of the Council and BTLS has been established to manage and monitor the project. The results of the market appraisal were considered by the Project Board and "ServiceNow" for the CRM and "3cLogic" for the telephony platform were selected to be the preferred and most cost effective solutions within the agreed budget.

2.4 ServiceNow is a cutting edge platform that is widely used within the private sector and has the functionality to deliver transformational change to service delivery, aligning with the Council's digital agenda.

2.5 Detailed analysis and design workshops to understand current service processes, system integrations, future service design and solution architecture have been conducted with key officers and BTLS to enable them to produce a detailed implementation proposal.

2.6 Given the scale of the project, SOCITM (Society of Information Technology Management) were commissioned to review the proposal on behalf of the Council, to ensure the system would meet current requirements and be capable of further development as appropriate.

3.0 CURRENT POSITION

3.1 3cLogic has been developed, is operational in a test environment and all staff training has been completed. Discussions are ongoing with BTLS to agree a go live date, which is anticipated before the end of the calendar year.

3.2 The timescales for the Service Now implementation project have been reconfigured; this is due primarily to the complex nature of the implementation proposal (summarised in s.4.3) and the reprioritisations of the introduction of the chargeable garden waste collection service, in order to generate additional income for the Council. All three projects have been under development concurrently and involved the same officer resource.

3.3 The implementation proposal has now been finalised.

4.0 CAPABILITIES OF SERVICENOW

4.1 The ServiceNow Customer Service Management (CSM) solution is a feature rich platform that provides an extensive set of customer service capabilities to meet the Council's needs and future business requirements. It is also a platform development tool that will enable Officers, once trained, to make changes and develop the platform further in-house.

4.2 BTLS have already invested in the ServiceNow IT Service Management (ITSM) platform for their ICT helpdesk, which they have recently launched and are therefore experienced in developing the platform. Cumbria County Council have also successfully implemented the ITSM platform and have developed this further since they launched the product a number of years ago.

4.3 The key deliverables of this phase of the project include:

- Formal ServiceNow training for key Officers.
- Integration between ServiceNow and 3cLogic to enable automatic caller identification for calls into the Customer Service Contact Centre.
- The migration of services that are currently delivered through the current Northgate CRM, both via Customer Services and online, to ServiceNow along with the current integration to back office systems (i.e. Aareon QL used in Housing and Inclusion and Northgate M3PP used in Leisure and Wellbeing).

- The migration of Street Scene's Round Maintenance System to ServiceNow. This will remove the back office system and streamline current manual processes.
- Transformation of the current domestic pest control process by delivering this end to end within ServiceNow, removing paper processes and enabling mobile working for operatives.
- The creation of custom workflows to enable web and email enquiries to be created without intervention by the Customer Services team. This will also, for the first time, enable back office teams to update and close a case which will be visible within the CSM, therefore providing a complete view of the interaction.
- Improving the online payment process.
- The introduction of a mapping tool to enable customers to report an issue or submit a request online by selecting a location on a map, whilst also viewing issues that have already been reported in the same area. This feature removes the current duplication of requests such as fly-tipping.
- Improved appointment booking facilities for services available both online and via Customer Services.
- The ability to create and produce reports using data held within ServiceNow without needing ICT support.

5.0 IMPLEMENTATION

5.1 BTLS have provided an indicative ten month implementation plan for the first phase, which will start in January 2018 and is deliverable over three stages. Each stage will run concurrently to enable multiple launch dates.

5.2 Due to the level of work involved in developing and implementing the key deliverables at section 4.3, the remaining available features within the solution will need to be developed in phase two of the project. Phase two will be planned during the later stages of phase one, with the implementation process starting once phase one is complete. The remaining features include, a citizen self-serve portal/account, social media channels, web chat, campaign facilities and customer surveys.

5.3 As with any major strategic ICT project, it is inevitable that some functionality issues will occur during the implementation stages, however, Officers will continue to work closely with BTLS throughout the process, to ensure any issues are reviewed and resolved.

6.0 SUSTAINABILITY IMPLICATIONS

6.1 There are no significant sustainability impacts associated with this article and, in particular, no significant impact on crime and disorder.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

7.1 There are some financial and resource implications arising from the first phase of the project, in respect of development costs and officer time to implement the

solution, however these have been met from existing resources. Further development phases will be reported back to Members at a later date.

8.0   RISK ASSESSMENT

8.1   The implementation of ServiceNow will transform service delivery and improve the Council's online service provision. As each stage is launched, the reliance on the existing inefficient Northgate CRM system will also reduce. If the project is delayed, the existing CRM system, which is unsupported from April 2018, will continue to be used. This will result in the Council being solely reliant upon BTLS being able to resolve any issues with the operation of the software.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Article.

Equality Impact Assessment

This article is for information only and does not have any direct impact on members of the public, employees, elected members and/ or stakeholders. Therefore no Equality Impact Assessment is required.

Appendices

None