Save time, money and effort with a CRM platform designed for Local Authorities

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Frequently Asked Questions

- Is this session being recorded?

  - Yes

- Can I get a copy of the slides? Can I see the case study you reference?

  - Yes, we'll email a PDF copy to you after the session has ended.

- Can we arrange a re-run for colleagues?

  - Yes, just ask us.

- How can I ask questions?

  - Please mute your line to reduce background noise (press *0 to mute your line)

  - Please use the chat facility in Webex – Direct questions to **Rachel Clinton** or Everyone (if we run out of time we will follow up with you afterwards)

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Agenda

- Contact Centre as part of the My Council Services platform:
  - Demonstration of Contact Centre
- Extensions for MCS Contact Centre…
  - Email Centre
  - Knowledge Management
  - Social Media
- Next Steps

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Workflow, data flow & architecture
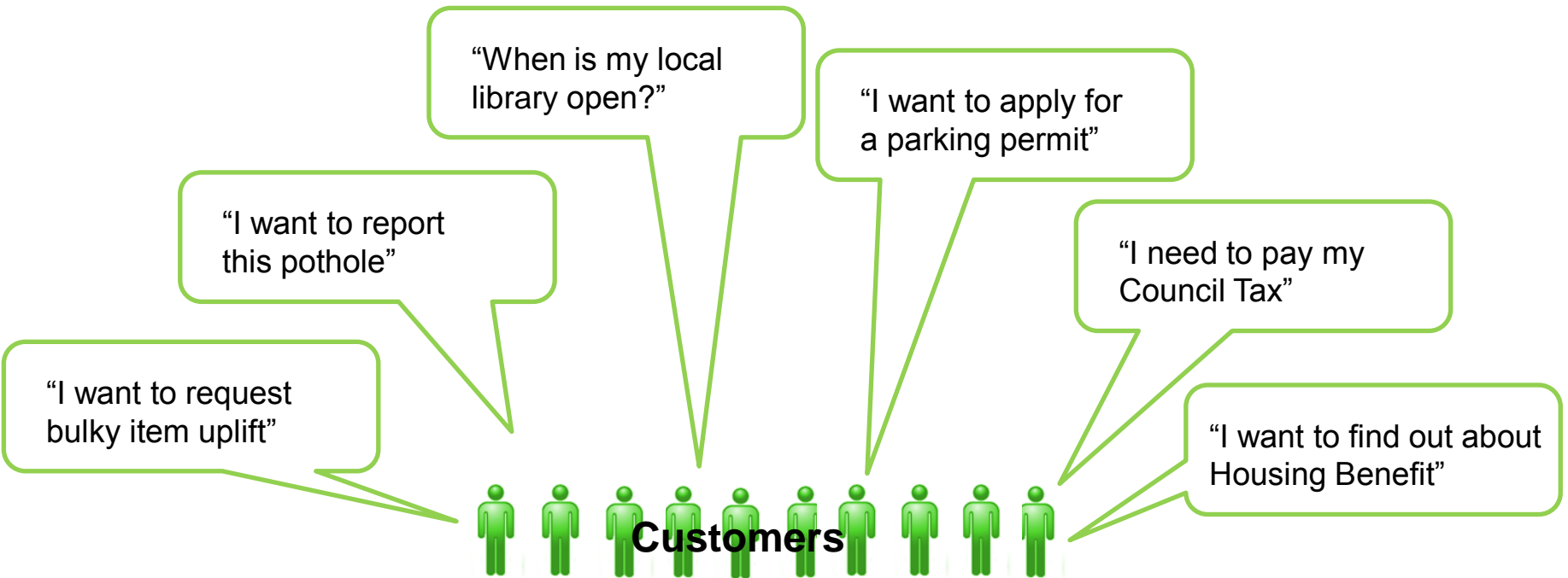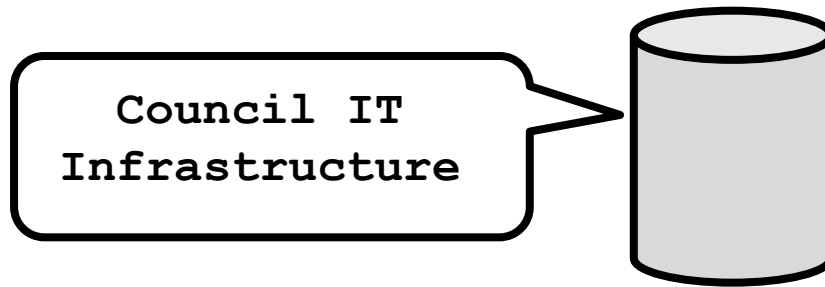
Workflow, data flow & architecture…

Council IT Infrastructure
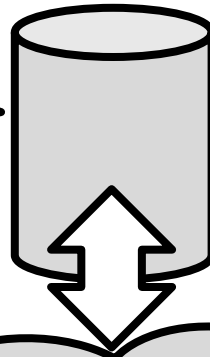
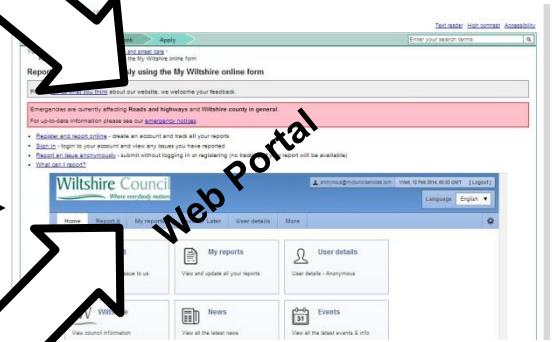- **Web services integration to back office**
- **Web service calls MCS web services**
- **Automated case / customer creation in back office**
- **Synchronisation of notes & status back to customer**
- **40 bit SSL key for securing our web services over https**

CRM   **FORMS**   **RULES**   **MOBILE WORKER**

Configuration & Control
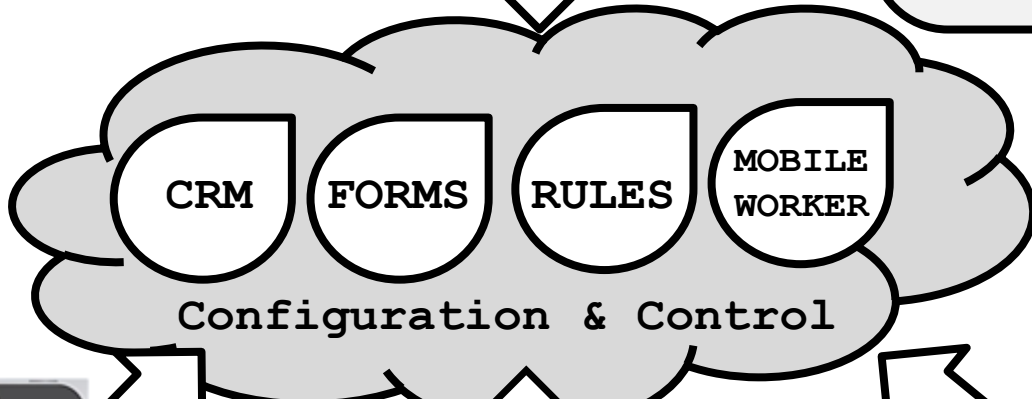
Native App

Web Portal

Mobile Workers

Customers

What is My Council Services?

- Totally agnostic about back office systems
    - Integration to Line of Business and / or workflow applications
    - Configurable integration using web services
    - Integration through middle ware if required
- Private cloud delivery – almost zero local IT footprint
- Master data management
    - Designed to perform as a source of clean, complete, distinct and accurate customer data for the entire organisational enterprise.
    - **Trusted customer data** is held in a central MDM schema.
    - **Consolidation services** manage the movement of master data into the central store.
    - **Cleansing services** de-duplicate, standardise and augment the master data.
    - **Governance services** control access, retrieval, privacy, audit and change management rules.
    - **Sharing services** include integration, web services, event propagation, and global standards based synchronisation.

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Demonstration - structure

- Demonstrate the full lifecycle of a service request
  - Customer registers through self service form
  - Inbound interaction using Contact Centre
  - Raise Service Request
  - Managing the request & other interactions
  - Assign for resolution through Mobile Worker
  - The broader data landscape towards MDM

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Contact Centre - details

- The ability to create a task from the contact centre. The agent should be able to select the task type, subject and description, and a field to assign it to a user.

- The ability to plug in web services to other systems. This will allow the agent to query other systems, for example an internal revenues & benefits system.

- The ability to allow a VOIP system to pass the Caller ID and trigger customer look up .

- In the interaction history the agent which created the interaction is visible.

Contact Centre

- The ability to query the knowledge management.

- Let users customise the pages the way they want. The flexible regions plugin will allow your end users to customise the pages and regions the way they want.

- You can allow the users to re-size any region or drag regions around.

- This plug-in can:
  - Make a region resizable
  - Make a region drag-able
  - Save (or don't save) any changes per user in a custom table

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Contact Centre bolt-on modules - Email Centre

- Inbound emails with automated keyword recognition and automated service request creation.

- Outbound email are sent to the end user with all context of the service request.

- All interactions are saved against the citizen for future reference
  - From customer to council
  - From council to customer

Contact Centre bolt-on modules - Email Centre

- Customers and staff will be able to respond to incident by replying to email
  - Any attachments and emails will be stripped off from mail and added as uploaded pdf or image documents to the case.
  - Text from email will go into the note. Ideally the documents will be captured at notes level as opposed to case level.
- Correspondence will also be validated to ensure that the sender is the same as the intended recipient of the original email.

Contact Centre bolt-on modules - Chat

- A plugin which allows your website users to chat directly with the contact center users

- All questions will first query the knowledge base where the platform will automatically answer questions.

- It will likely be an add on to Contact Centre
  - Probably 3 months from delivery

Advice to get started

- Is a 'traditional' enterprise CRM platform really required? Focus on the key requirements of capturing, recording and managing customer interactions

- Don't get hung up on wider IT landscape – integration to other systems and data is generally straightforward and can be completed in prioritised phases

- MCS costs are relatively low to get started – consider letting us help you with a business case support implementation / transition

- Start with some tactical wins and plan for the mid to longer term strategic goals

- Really think about how much home grown solutions ultimately cost – COTS software which is quickly customisable is often very cost effective