

### Case Study

## Customer Request Management System Helps Burwood Council Deliver Better and Faster Resident And Community Services

#### CUSTOMER PROFILE

Burwood Council provides almost 500 services to 30,000 residents in a 7km<sup>2</sup> area in the inner western suburbs of Sydney. The NSW State Government has identified Burwood Council's area as a major commercial development centre

#### BUSINESS SITUATION

To continue to provide high quality customer service, Burwood Council wanted to implement an easy to use, cost effective and scalable solution to collect, track and report on the increasing amount of correspondence coming into and going out of the Council

#### SOLUTION

Burwood Council implemented a Customer Request Management System to manage the communications between its personnel and its residents and community

#### SOFTWARE

Microsoft Dynamics CRM 3.0

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*- General Manager, Burwood Council*

Burwood Council, situated in the inner west of Sydney, has a mission to create a quality lifestyle for its community and residents by promoting harmony and excellence in the delivery of Council Services. To achieve this, the Council is committed to providing its team with the tools they need to respond appropriately and in a timely manner to the queries from its community and residents. With over 500 services being delivered to 30,000 people, the Council needed a way to collect, track, approve, correspond and report on the communications coming into and going out of the Council. CDC Praxa and Burwood Council worked together to create a consolidated, department-wide Customer Request Management System based on the Microsoft Dynamics CRM platform to support a cohesive response to people's varied needs.

Burwood Council's Project Manager for the adaptation and implementation of the CRM explains, "We were experiencing difficulties with customer query information once it had left our central contact centre. Without a single view of a case we were unable to track its progress through the extensive manual system, which included paper-based correspondence and approvals from the Officers, Managers and Directors across the different departments. The problems were only going to get worse and it was clear that we needed to take action to ensure we could offer prompt and useful responses to the community and residents, as well as being able to access all the information from the one, easy to use application."

"Many enquiries are straightforward, however, some need the attention of several officers across different departments such as Technical Services & Operations and Planning & Environment. Furthermore, we may get more than one enquiry from a single resident or interested party. It is important for our team to know where each case is currently up to and all relevant information associated with the case. We must be able to easily keep our customers up to date with its progress. As a Council committed to quality service and delivery, it is essential that we remain in control. We do not want a customer to complain of a late or mismatched reply or worse, for us not to know where the case is up to if they did."

CDC Praxa delivered a Customer Request Management System based on Microsoft Dynamics CRM that gives the entire team at Burwood Council a single view of each case with all related responsible people, correspondence, approvals, requests and activities in one place. The flexible security settings enable the Council to restrict information based on individual user permissions and enable us to share records as necessary. By making very good use of the inherent workflow capability in a correspondence approval process and with triggered notifications, the cases are kept on the move with automated processes.



"It has also been about empowering our Officers, Managers and Directors to use their skills in offering a top-quality service, now that frustrations have been removed, such as duplication of effort and the difficulty of finding accurate information," explains Burwood Council's Project Manager. "Furthermore, each person is accountable for their work and we are able to track performance and activity in the system's audit trail. Anyone from the General Manager down will be able to access information on a case if needed."

"Not only do we receive ad-hoc queries from customers," says Burwood Council's General Manager. "Our Mayor also proactively visits the community in "Doorknock" campaigns and street meetings to encourage feedback from our residents and community. Without our Customer Request Management System to support our Mayor's endeavours, we would struggle to derive the value out of this feedback to inform improvements to our services."

"The Customer Request Management System allows us to build a very valuable asset inside our organisation," continues Burwood Council's General Manager. "Our team leaders can easily and quickly generate reports to track against KPI's, such as the number of new cases raised in any period, the nature of the cases and the response times. This intelligence helps us to allocate resources where they are needed most. The NSW State Government has identified Burwood Council as a growing major commercial development centre and we will rely on the Customer Request Management System to handle the increasing interaction with our customers and prospective customers."

The Senior Manager, Information Services of Burwood Council discusses the criteria leading to the Council's choice to implement Microsoft Dynamics CRM. "At the user level we had to implement a system our people would quickly adopt. With its native integration with Microsoft Outlook and Microsoft's other office systems such as Excel and Word, Microsoft Dynamics CRM doesn't need a separate log-in. It is already familiar to our people, so it wasn't going to need such a huge leap of faith to get them to use it. From a strategic IT viewpoint, we have a commitment to the Microsoft platform and turned to Microsoft Dynamics CRM for evaluation. CDC Praxa showed that the solution would meet the majority of our requirements out of the box and how it could be configured and customised to map to our specialised processes. We are confident that the flexibility of

the platform will accommodate evolving business priorities and processes, while interfacing with other business systems and technologies such as Microsoft SharePoint in the future."

"The perspective that CDC Praxa brought to our project from their unmatched experience was extremely valuable to us in three ways," continues the Senior Manager, Information Services of Burwood Council. "Firstly, their innate understanding of the solution itself, relational databases and business processes meant that solution architecture was effectively mapped and correct the first time around. Secondly, they showed us a roadmap, giving us the confidence that we had chosen not just the right technology, but also the right team to work with us. Thirdly, CDC Praxa's team could rein in a manageable phase one, which addressed immediate objectives and goals, whilst delivering fast results."

"We are delighted to be working with Burwood Council, the first local Council in Australia to implement Microsoft Dynamics CRM," says Guy Riddle, Director of Strategic Alliances, CDC Praxa. "The Council had a firm vision of a solution that would support the growing agenda for customer service and we were able to confirm that Microsoft Dynamics CRM would help to realise that vision. With the first application of CRM in full swing, we are looking forward to rolling out similar value to other business functions at Burwood Council, using the extensive capabilities of the Microsoft Dynamics CRM platform."

A further benefit to Burwood Council is the reduced impact the Council has on the environment. The Senior Manager, Information Services explains, "Now that all documentation is stored electronically and the paper-chase is over, the Customer Request Management System is helping us move towards becoming a carbon-neutral operation. We are using less paper and less electricity."

"One of the most important functions of the Council is our Customer Service," explains the General Manager, Burwood Council. "The Council recently introduced the Customer Request Management System. We are now able to take all the feedback from the residents and community and investigate, communicate internally, track progress and respond in a timely manner. Burwood Council is now strategically placed to provide an even better service to our residents and community."

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