**Melton Borough Council
Corporate Use of CRM and
Electronic Document Management**

1 PURPOSE OF THIS PAPER

1.1.1 The current initiative to identify business critical developments that will facilitate the Council's ICT Strategy has listed a number of instances where developments of both Electronic Document Management and CRM applications should be undertaken. While these are itemised in the ICT projects list, they exist as separate activities, whereas the approach should be to treat these applications as a single corporate resource.

1.1.2 This paper sets out how these two applications should be developed as a single corporate initiative that will achieve the short-term objectives of the ICT Development Plan and deliver the potential for further efficiencies in the future.

2 CURRENT USE OF ELECTRONIC DOCUMENT MANAGEMENT

2.1.1 The current implementation of Open Text LiveLink at MBC extends to the Benefits, Housing and Legal business units. Its use is restricted to the scanning of documents after a case or process is complete. At this stage, documents are scanned and deposited in an electronic filing system that permits retrieval against installed metadata. It is not clear if the stored documents consist of all documents or are restricted to incoming documents received during the live operations connected with the case or process.

2.1.2 Most other documents that relate to live operations in the other departments of the council are scanned and stored on system drives (commonly referred to as the "Q" drive).

2.1.3 These arrangements effectively prevent access to documents by customer services agents when they are dealing with a customer enquiry as there is no integration between the document stores and either the CRM or the back office databases to which the documents relate. The only methods of retrieval require expertise of back office staff who are aware of the location of documents.

2.1.4 As most customer enquiries are document-based, the lack of this facility is a significant obstacle to dealing effectively with enquiries. The alternative of gaining access to background databases through the use of integrators assumes all customer service agents are trained in the use of all back office systems and that the integrators are effective. MBC has experienced difficulty in both of these areas.

3 OPPORTUNITIES FOR IMPROVMENT

3.1.1 It is likely that the existing implementation of LiveLink can be improved to the extent that it can be applied corporately to all departments of the Council and, at the same time, be properly integrated with back office systems including the councils existing CRM. This would enable users, including customer services agents, to gain immediate access to live documents and the background database simultaneously, without the need for additional access or keying.

3.1.2 While these additional functions will require additional setup and configuration, the resulting improvement in functionality across all of the Council's activities will repay the effort in terms of improved efficiency.

3.1.3 In addition these improvements will cover the following projects in the IT Development Plan:

- o Planning Public Access
- o Document management Improvements
- o Committee Minutes

And also contribute to:

- o CRM Developments
- o Single View of Vulnerability
- o Intranet and Collaboration

3.1.4 The suggested improvement will facilitate direct access to all documents as illustrated:
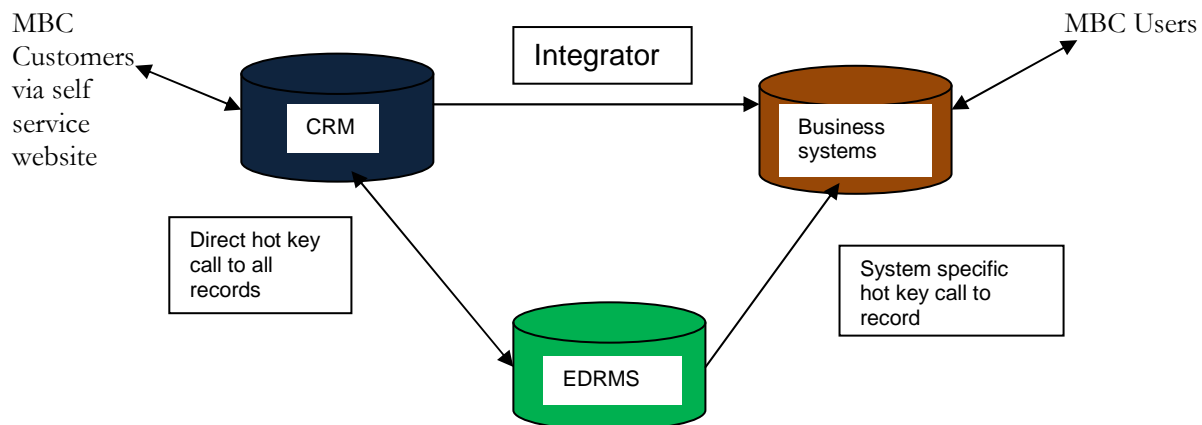
their database, (and vice versa) while customer services agents have the ability to access all documents that may be pertinent to the current enquiry, with additional access to background data. Provided adequate authentication can be guaranteed relevant documents can also be accessed by customers using the existing self service facilities available on the council website.

Integrators remain an alternative means of access especially where an enquiry leads to the initiation of an action by a department; e.g. request for a bulky item waste collection. However, it is unlikely customers will be able to gain direct access to background systems through these integrators.

The model also demonstrates the availability of documents across the whole range of Council systems, facilitating the introduction of a corporate document management system that will satisfy the information needs of the organisation.

4 SHORT TERM DEVELOPMENT

4.1.1 In order to achieve this short-term improvement, the council will need to allocate resources to work with the system supplier and undertake the necessary extension of set-up and configuration actions mentioned above.

4.1.2 These resources should be distinct from business-as-usual resources, as they will, in effect, be devising a corporate system that must then be administered corporately. The most likely areas from which these resources could be allocated is the Change Team and Customer Services.

4.1.3 It should be born in mind that this development team will go on to become expert users who will carry forward support and development with minimal requirement for additional input from the system supplier. The need for this continued role should be considered when allocating the right team of people to the project.

4.1.4 There is a current investigation in progress to ensure LiveLink is capable of extension as described and, provided this is confirmed, the development envisaged could be completed in the remainder of the current financial year.

5 LONGER TERM DEVELOPMENT

5.1.1 It is likely the council will wish, in the longer term, to investigate the development of a fully-functional corporate Electronic Document and Records Management (EDRMS). This is likely to result in the specification and eventual choice of an alternative product to LiveLink.

5.1.2 In this eventuality, the work that is necessary to achieve the immediate improvement will not be wasted, as the initial document setup and configuration is exportable to any of the leading EDRMS products currently in use in local authorities nationwide.

6 PROJECT MANAGEMENT

6.1.1 In addition to the setup and configuration tasks described above, the Council should also consider the need for project and programme management both in the short term, to achieve the outcomes in the current financial year, and for future development.

6.1.2 While the system supplier will be required to undertake the technical aspects of setup and configuration and provide training to internal resources, we strongly recommend that they are not commissioned to undertake the project management role.

6.1.3 Socitm Consulting has significant expertise in the implementation of EDM and can provide the necessary project management input at the start of the project. The aim would be to achieve the short-term outcomes and undertake the necessary skills transfer to ensure internal resources will be able to continue this role into the future.