

ABOUT THE ORGANIZATION

The Colchester Borough Council (The Council) is a local government authority within the County of Essex in the United Kingdom. With roughly 600 permanent staff based out of at least ten locations, The Council is one of the largest district authorities in the country, providing services to approximately 190,000 residents. Residents benefit from services including refuse and recycling collection; housing advice; food and safety inspection; planning services; and licensing and permitting.

Originally, The Council operated as individual departments, each with its own mechanism to collect and retain customer data with no visibility across the organization. After an unsuccessful implementation of a CRM platform with a third-party vendor, The Council collectively determined the need for a solution that provided efficiencies needed to manage their range of services and offices. The solution needed to be accessible across multiple departments, offer front office to back office continuity, and most importantly, offer a single system for resident records.

SOLUTION

Colchester Borough Council implemented Microsoft Dynamics CRM previously and paired up with another local authority with the intention of collaborating on customizations for the system. However, with support from The Council's ICT department, the decision was made to move to the Microsoft Cloud and to upgrade their current CRM solution to Microsoft Dynamics 365.

"We had made our mind up that we really wanted to do this in Dynamics," says Darren Marzell, CRM Product Manager for Colchester Borough Council. "We believed in the product."

Today, The Council operates a number of services on Microsoft Dynamics 365 with approximately 70 users. Dynamics 365 has provided a complete 360-degree view of Colchester's resident database, allowing full access from front to back office, organization-wide. Prior to Dynamics 365, each department used different procedures to collect data, which provided limited visibility into processes and information for other departments. By leveraging the customer service application within Dynamics, The Council developed customized workflows and views. Additionally, Dynamics 365 allows Council employees, such as Customer Service Agents and Street Wardens, visibility into each process stage in order to provide end-to-end support.

Customer service agents account for about one-third of The Council's users. Dynamics 365 provides them visibility into each step of a customer service request, from the initial request through to completion. The Council currently tracks feedback on their website into Dynamics 365 and manages resident updates and complaints in real-time. Tracked activities give them the ability to see when and where emails are being sent or where a complaint sits in the queue. Emails from residents also live in Dynamics, providing a complete customer profile to customer service agents.

Residents can interact with the newly-designed website, which is built entirely using Dynamics 365 portals for self-service forms for things like support requests, scheduling a class or appointment, ordering products or reporting problems.



*THE COLCHESTER
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TRANSFORMED ITS
RESIDENT ENGAGEMENT
AND ENHANCED
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BY IMPLEMENTING
MICROSOFT DYNAMICS
365 AND LEVERAGING
CUSTOM PORTALS,
WORKFLOWS AND THE
MOBILE APP.*



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ADAM PIERCY
Web Development Manager
Colchester Borough Council

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“If you’re out and about and you want somebody to come and clean up the street because there’s graffiti, or there’s an abandoned vehicle, you submit a request via our online portal,” says Adam Piercy, Web Development Manager for Colchester Borough Council. “We use Microsoft Dynamics for that.”

With Dynamics 365, employees can identify residents and reduce record duplication from front and back office operations. Using the Microsoft Knowledgebase, Council staff can provide residents with information regarding refuse waste, recycling services available, collection days, what can be collected, how to apply for exemptions and more. This single repository creates efficiencies not only for residents, but also for The Council, all while allowing for complete customization within the system.

Mobility

The Council’s use of the Dynamics 365 mobile app has transformed their recycling and waste services. Approximately 20 Street Wardens access Dynamics 365 on tablets and phones. This mobility allows Street Wardens to connect with residents on reported issues and update note logs, including photos, all on site. Resolution times average about an hour now, as compared to the days it would take for the initial processing and scheduling that would have to occur before a Street Warden could even make it to the reported problem site.

“It’s the ability to leverage our investment in Dynamics ourselves that gives us maximum efficiency,” says Marzell.

The Council uses Views, Dashboards and Power BI to run daily reports in Dynamics and to monitor progress for the recycling and waste department and others across the organization. After go-live, Power BI allowed them to view data such as refuse collection volume and collection type for example, by different geography on a map.

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PowerObjects Training

Colchester Borough Council signed their contract for Microsoft Dynamics 365 the day it was released in the United Kingdom. Having customized earlier versions of Dynamics prior to implementing Dynamics 365, The Council began exploring training documentation and determined that even with their advanced



CHALLENGE

The Colchester Borough Council needed training to extend their Dynamics 365 knowledge and accelerate their ability to leverage custom functionalities to fit the unique needs of the organization.

SOLUTION

PowerObjects and The Colchester Borough Council collaborated on developing custom training to set the foundation for current and future developments.

BENEFITS

- + Extend internal knowledge to manage deployments, customizations and overall success.
- + Improved customer service experience via portals and mobile app.
- + Single repository, organization-wide, with real-time updates and back-end functionality.



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skillset and product knowledge, version-specific training as well as training specific to CRM portals would accelerate and extend their overall knowledge and go-live success.

“We told PowerObjects that we knew what we wanted to do as an organization and this is how we want to do it,” says Piercy. “We asked them for a proof of concept and again, PowerObjects delivered exactly what we wanted them to deliver, and then we started the training discussion in depth.”

The Council engaged with the PowerObjects Education Team to begin conversations around The Council’s specific business processes and an internal training program for the Colchester team.

“[The training consultant] and I had a long conversation before he ever set foot in the UK to discuss exactly what we wanted and what we wanted to get out of it,” says Marzell. “The training was absolutely tailored to our requirements. Our trainer went through the entire course with us and provided loads of real-world examples. He is clearly a Dynamics expert, I have no doubt about that.”

Custom training allowed The Council to focus in on their unique business processes and customizations while also paying attention to the functionality of front-end portals. The custom training delivered by the PowerObjects Education team has been critical to setting the foundation for future developments.

“The philosophy of teaching a man how to fish seems to be embedded in PowerObjects’ consulting philosophy,” says Piercy. “They ask what you want to accomplish and then teach you the way to do it.”

This partnership with PowerObjects allowed The Council to truly own their system, while still having the support of a value-adding services partner.

Future Considerations

Ultimately, the Colchester Borough Council aspires to shift the entire organization to Dynamics 365. For now, The Council continues rolling out new processes and functionality of the platform, including resources for the leisure center and kids club. Additionally, on the website, pages for Colchester’s Tax, Benefits and Licensing departments, along with a few others, will go-live in February of 2018.

With the tools and resources delivered from PowerObjects’ custom training, The Council has immediate plans to continue internal development and expand its knowledgebase to other local authorities within the United Kingdom.



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CRM Product Manager
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