Replacement of Contact Centre Software
EXECUTIVE MEMBER: Councillor N Williams
LEAD OFFICER: Jane Salt, Head of Customer Services
REPORT AUTHOR: Jane Salt, Head of Customer Services

Summary and Recommendation: To approve the project plan for the replacement of the contact centre softwa

1. INTRODUCTION

1.1 At the Executive meeting on 24 April 2007 it was agreed to pursue the replacement of the existing contact centre software with the supplier who had been developing a system with the Connected Cumbria Partnership, that is CGI. Due to the uniqueness of the Excelsior product it was agreed that a full tendering process was not required.

1.2 It was also agreed that a further report containing a detailed project plan should be presented to the Executive. The project plan is shown at Appendix A, this forms part of the project initiation document which is available in the Members Room.

2. ARGUMENT

2.1 The main reasons for wanting to replace the CRM are:

- Our existing system (BTCC) offers limited functionality that is restricting Customer Service performance and affecting business continuity.
- The costs of developing BTCC to meet the Council's current and future requirements prohibits the enhancements required.
- BTCC requires expensive annual licensing and maintenance to support the functionality

2.2 The implementation of the Excelsior product will address all of these issues.

3. OPTIONS TO BE CONSIDERED

3.1 In order to deliver the project on time it is essential that there is a detailed project plan.

4. CONCLUSIONS

4.1 That the project plan be commenced following this report.

5. FINANCIAL AND HUMAN RESOURCES IMPLICATIONS (INCLUDING SOURCES OF FINANCE)

5.1 The financial implication is the cost of purchasing the Excelsior product but this will lead to year on year savings. It is currently anticipated that the cost is covered within existing budgets.

5.2 The human resource implication is the resource required to implement the new system and time for the training of all customer service officers.

6. PROJECT AND RISK MANAGEMENT

6.1 These are all included in the in the project initiation document which is available in the members room.

7. IMPACT ON CORPORATE PLAN

7.1 The Excelsior product will support the Council in becoming more customer focussed (2.5).

List of Appendices

Appendix A - Project plan

List of Background Documents: Executive Report 24.04.07
List of Consultees: Cllr Norman Williams, Corporate Team

CHECKLIST FOR DEALING WITH KEY ISSUES

Please confirm against the issue if the key issues below have been addressed. This can be by either a short narrative or quoting the paragraph number in the report in which it has been covered.

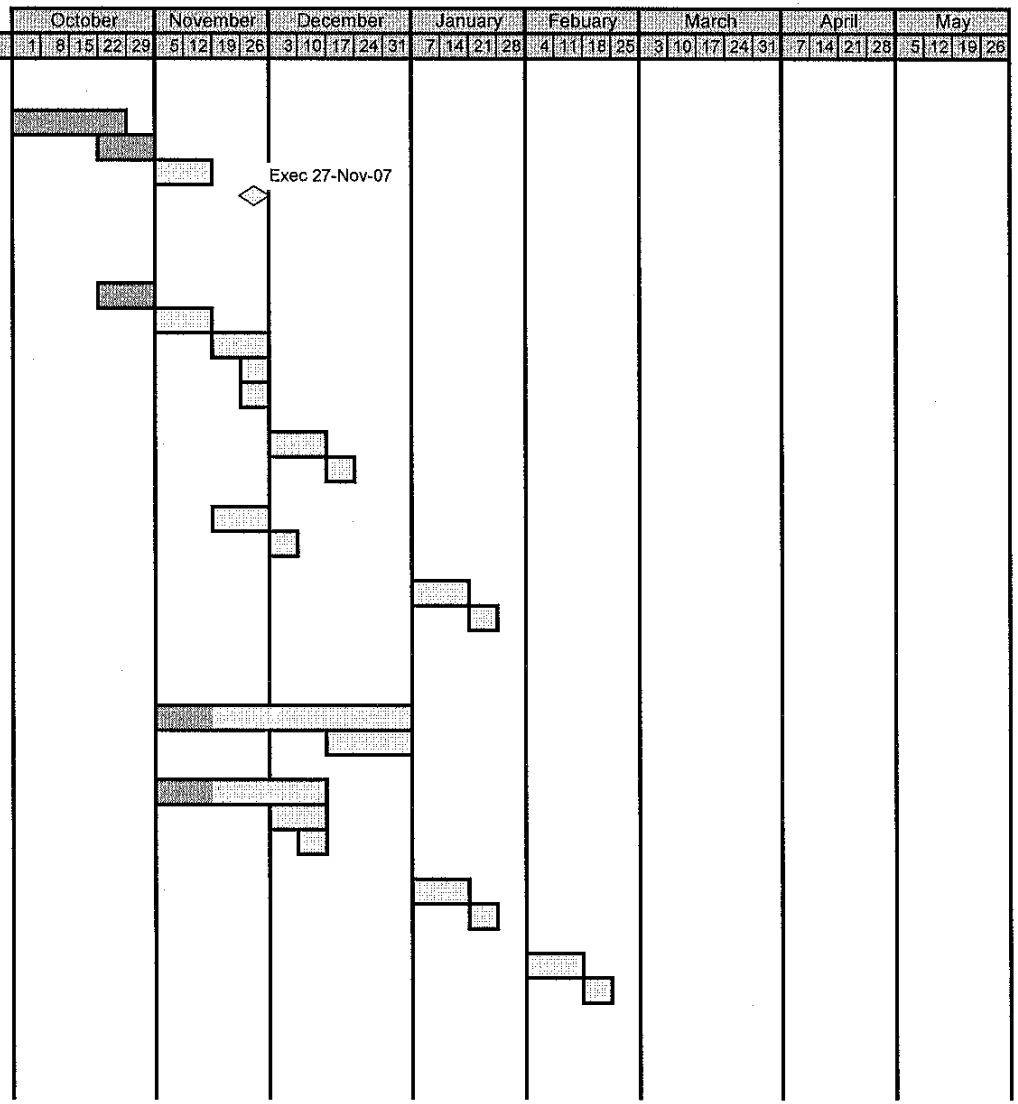
Impact on Crime and Disorder	Assist the recording of calls
Impact on Sustainability	Ensure equal access for all

Impact on Rural Proofing	Ensure equal access for all
Health and Safety Implications	Assist the recording of calls
Impact on Equality and Diversity Issues	Ensure equal access for all
Children and Young Persons Implications	Ensure equal access for all
Human Rights Act Implications	Ensure equal access for all
Monitoring Officer Comments	No comments
S151 Officer Comments	

Please say if this report will require the making of a Key Decision NO

CRM - Phase 1 Plan

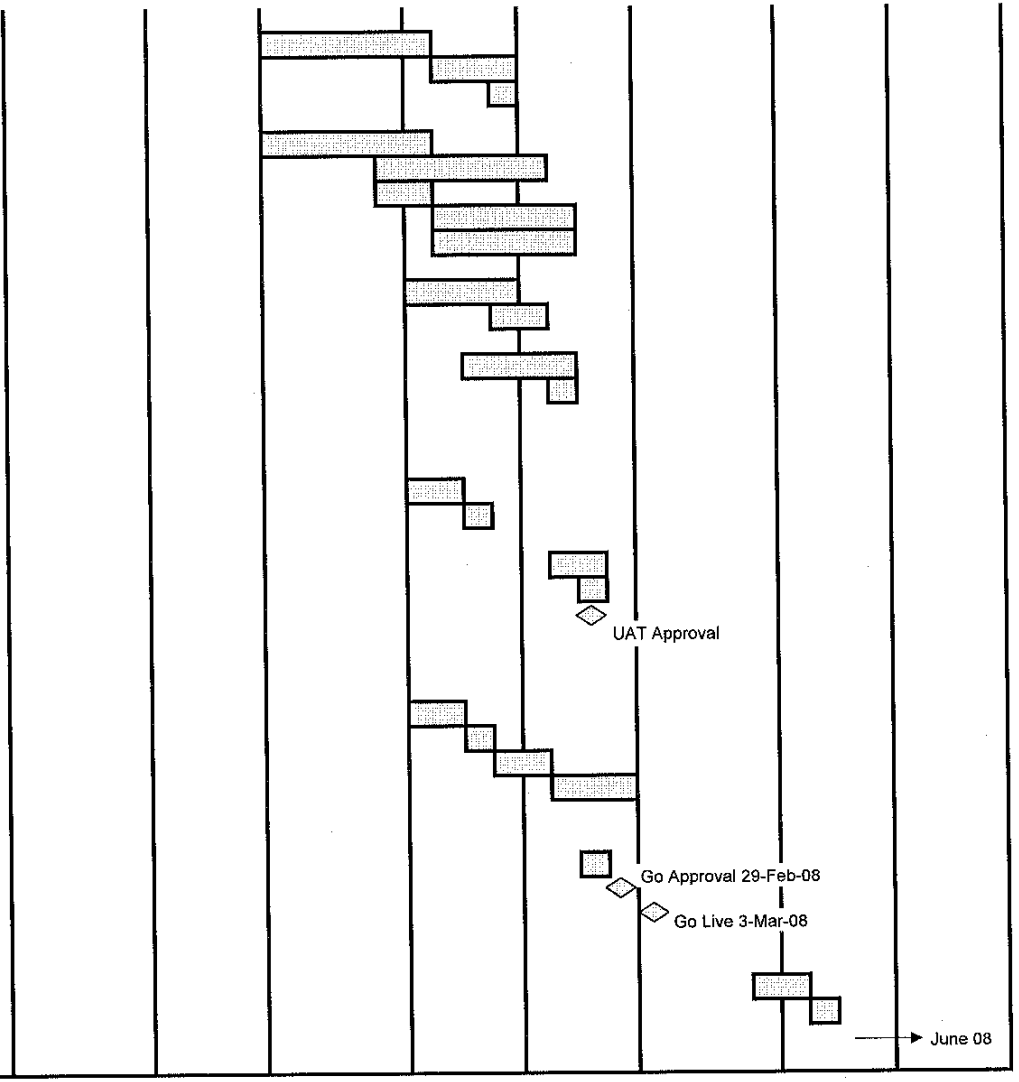
Task Name	Resource
Project Start Up	
Gather high level requirements & costs	RQ, BG, ME, CGI
Create project plan & Exec report	RQ, JS
Consultation	JS
Exec Approval	JS
Initiation & Planning	
Project Initiation Document (PID)	
Draft PID	RQ, ME
Approve PID	Board
Agree Future support arrangements	ME
Sign Contract with CGI	JS, CGI
Set Up Project Controls	ME, RQ
Communication Plan	
Draft Communication Plan	ME, RQ, IC
Approve Communication Plan	Assurance Team
Data Migration Strategy	
Draft Data Migration Strategy	ME
Approve Data Migration Strategy	Assurance Team
Decommissioning Plan	
Draft Decommissioning Plan	ME
Approve Decommissioning Plan	Assurance Team
Process Design & Rollout Plans	
Configuration Requirements	
Draft Configuration Requirements	ME, SS, BG, CGI
Approve Configuration Requirements	Assurance Team
IT Infrastructure	
Confirm Hardware Arrangements	MS, ME, CGI
Technical Review	MS, ME
IT Infrastructure Approval	MS
Business Process Plans	
Draft Business Process Plans	SS, ME, BG, JS
Approve Business Process Plans	Assurance Team
Benefits Management	
Draft Benefits Management Plans	ME, SS
Approve Benefit Management Plans	Assurance Team
Solution Modelling	
Configuration and System Set Up	
CRM	



19/11/2007 13:50

CRM - Phase 1 Plan

Infrastructure	
- Install & Configure Base System	CGI
- Infrastructure Testing	CGI
- Test Set Up	CGI
Prepare CRM	
- Implement Configuration Requirements	CGI
- Design & Configure Poweragent Services	CGI, CBC
- Data Cleansing / Mapping	ME
- Populate Customer Database	ME, CGI
- Populate Service A to Z	Copeland Direct, CGI
Waste	
Implement Configuration Requirements	SH
Build CRM Interface	CGI, SH
Telephony	
Install & Configure to Requirements	MS
Test Set Up	MS
User Acceptance Testing (UAT)	
Test Plans	
Draft Test Plans	
Approve Test Plans	Assurance Team
Implement UAT	
Undertake UAT	IT, Copeland Direct
Review Results	Assurance Team
UAT Sign Off	Assurance Team
Training	
Training plan	
Create Training Plan	ME
Approve Training Plan	Assurance Team
Create Training Documentation	CBC
Implement Training Plan	ME
Go Live	
Go Live Preparation	ME
Go Live Approval	Board
Go Live	
Phase 1 Closure	
End Phase Report	ME
Closure Meeting	Assurance, Board
Post Go Live Review	Assurance, Board



19/11/2007 13:50