## Annex 1 – Glossary of Technical Solution

### Customer Relationship Management (CRM) System

The CRM system is the key component in our overall solution. The CRM system has a database where all customer contact with the council is recorded, irrespective of the method used by the citizen to contact the council. So for example, contact by telephone, face-to-face or over the web, all results in the creation of a new record on the CRM system. This record will has a unique identifier which can be tracked, searched for and reported on.

The CRM allows the Customer Service Representatives (CSRs) to deal with a large range of enquiries through a series of scripts or prompts that are available when a citizen makes contact with the council. These prompts enable a CSR to provide information, to create and fulfil a service request, or to direct a call to the appropriate place in a back office system for further processing.

The **e-forms** solution provides the council with the ability to create our own electronic forms within the CRM for use in the YCC and on the website. The electronic forms can be pre-populated with information, and used to take information from a citizen and pass it in an electronic format directly into another computer system for processing and via the CRM for logging. The benefit to the council in using e-forms can be realised by citizens self-serving. As e-forms can be validated before submission by the citizen, this will save officers time in having to manually check the information on the form, and also release officers from the burden of having to re-key the information into more than one system.

**Workflow** has been defined as *getting the right work, to the right people, at the right time, every time, and knowing that you have done so*. The workflow solution provided by the CRM gives us the functionality to setup business rules around how information or transactions are moved between various easy@york components, and also to and from back office systems. The workflow solution also gives us the ability to schedule work, and monitor and report on these actions including the achievement of performance targets for customer service delivery.

### Telephony

To enable our total easy@york solution to work, we have implemented some new, specialist telephony functionality which gives us the facility to take calls and automatically route them to an available CSR or appropriate member of staff in the back office. The solution is also used to manage the queues, automatically give messages e.g. if there is a delay answering the calls and take voicemail messages from citizens. When the call is answered the telephony kicks off a CRM recors at the appropriate point. It has sophisticated call management reporting to enable the YCC manager to monitir performance in the YCC in real time.

### Content Management System (CMS) and Web Portal

The Content Management System (CMS) and web portal are two distinct systems, but are generally viewed by people as the 'website'. The web portal is the front-end customer view of the council, the place where you can search for information,

download a form, complete forms on-line, send an email, make a payment, make a booking. The CMS manages all the information behind the scenes.

The CMS can be viewed as a repository for all the information that the council wishes to make available to citizens and officers. The information within the CMS is the same regardless of whether it is going to be displayed on the internet or intranet, and this helps us to ensure that we only have to provide this information once.

The CMS will be linked to the CRM to meet our **knowledge management** requirements. Using the CRM and workflow, the CMS can be searched to obtain the appropriate information required by the CSR or the citizen from the single repository of knowledge. This will enable us to ensure that citizens get consistent and up to date information whether they ring us or use the web-site

### Integration

The integration of the whole easy@york solution is necessary to ensure that we meet the Customer Vision, and improve services to citizens. There are two key areas of integration covered by the easy@york solution:

- Integration of the core components of the easy@york solution. It is essential that all of these core components are seamlessly integrated together, and that information can be passed seamlessly between the core components.
- Integration of the core easy@york solution with council back office systems e..f Northgate revenues and Benefits and CAPS Uniform Planning systems.

### Data Consolidation

The easy@york integration hub matches property and people data from a range of existing systems, to obtain a single view of customers, properties and organisations. The hub then ensures that connected back office systems are kept up to date with each other.

### Geographical Information Systems (GIS)

GIS systems enable the council to display information in a spatial way. The GIS system contains a series of base Ordnance Survey maps, overlaid with layers containing information from different directorates. For example one layer may contain the position of street furniture, whilst another contains ward information or socio-demographic data.

The Council's existing GIS capability has been integrated with the easy@york solution so that GIS information can be presented via the CRM and the web portal so that it can be used to complete service request. By using the GIS system we will be able to pinpoint the exact location of fly tipping or an abandoned car.

### Online Consultation System

On line system, that enables us to create our own customer surveys questionnaires and consultation exercises.