

Origen Technology Limited



# Case Study Nelson City Council

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## Centralised Customer Database and Customer Service Centre



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# Case Study for Nelson City Council

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## Council profile

Nelson City is situated at the north of New Zealand's South Island with Council administering an area covering 444 square kilometres. Though predominately urban, landscapes are diverse ranging from coastal beaches, estuaries and harbour to sub-alpine hill country.

Council is a Unitary Authority having a population of around 44,000, with 20,135 rateable properties as at 1 July 2008.

With over 250 staff and contractors, Council has a single administration complex within the Nelson CBD, and a main library with two additional branch libraries.

Major infrastructure includes New Zealand's fourth busiest airport, and a significant port handling around 200,000 tonnes of cargo per annum.

## Business situation

Council intend to put a team of customer service staff into a newly built area of its main facility so many of the customer service requirements can be serviced by this team. Supporting process will be put in place so requests for service can be escalated throughout the organisation and a consistent service can be provided across all business functional areas.

This new team will need wide knowledge of all council functional areas in order to service customer requests so will need an effective knowledgebase system from which they can quickly find information on all council issues. The following system needs are indicated.

- An organisation wide **service request system** such that all requests for service can be logged and managed. Whilst logging requests for service by customers will be a priority the system will also support requests for service within the organisation. This may be supported by a **presence management capability** so customer service staff can easily determine who is available within the organisation to assist with requests for service.
- A **knowledgebase** including **frequently asked questions** to enable staff to answer the majority of basic requests quickly. This will include direct links to the sources of knowledge on WEB sites and within council electronic document management system.
- A **customer relationship management system** so staff can see all business relationships with a customer and provide information and service based on

that knowledge. Much of this information is stored in council's core line of business systems.

- A definitive **customer and address database**. As the management of customers and the relationships council has with those customers is central to an effective service, council will need to develop and use a central customer and address dataset to link to all relationships council has with the customer.

## Technical situation

Requests for service are currently managed within each functional business area. In some cases a dedicated customer service team fronts the requests for that functional area but in many cases requests for service go direct to an individual.

Standards for the delivery of the service requests differ across the organisation and in many cases are not documented. KPI reporting is not done in most cases and the overall organisation performance on service requests is difficult to ascertain.

Systems have been developed to meet the individual business function requirements and in most cases a separate service request system exists for each functional area and in many cases a separate customer database also exists. This has resulted in about 20 service request systems and the same number of customer databases which are maintained in their business functional areas.

One of the core systems, Napier Computer Systems (NCS), runs on Linux Redhat ES and maintains a parallel MySQL data structure also running on Linux.

## Solution

Origen Technology Limited was awarded the contract to supply the Ozone Contact Centre and related software on 1<sup>st</sup> September 2009. They immediately set to work in order to meet the fixed requirement of an operational Council service centre just over three months later on 7<sup>th</sup> December.

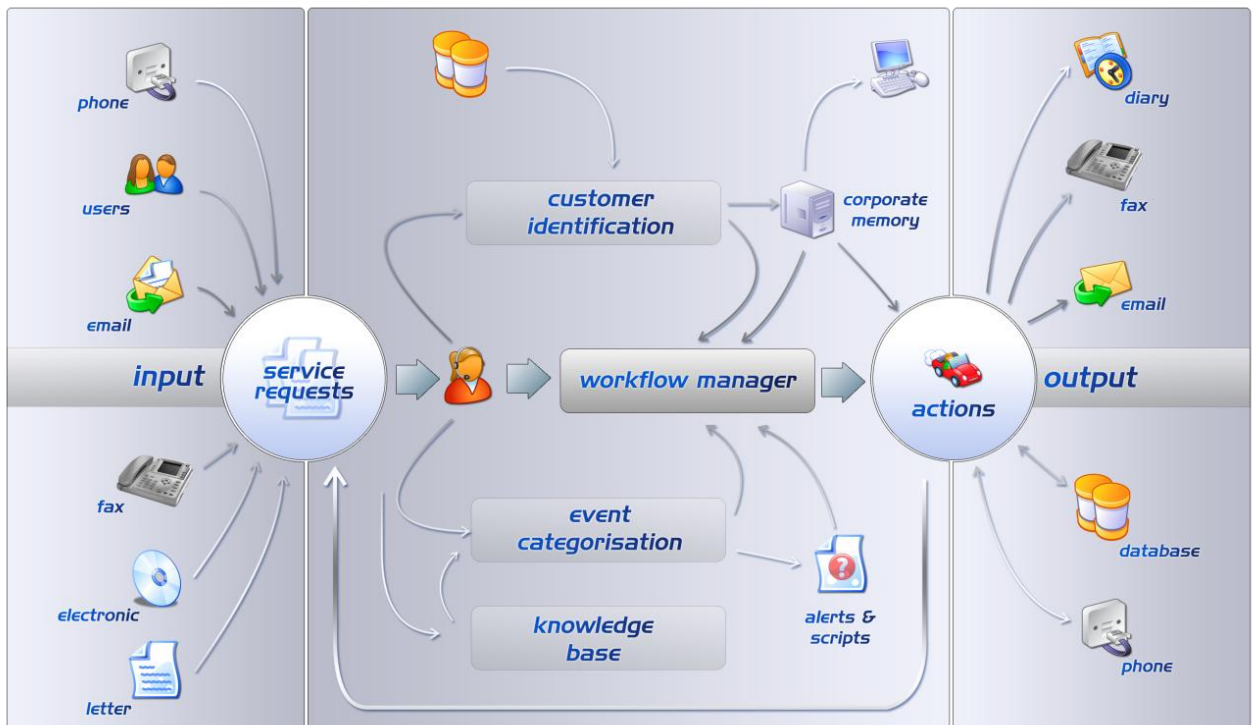
The core software solution was Origen Technologies Contact Centre software which consists of a number of modules within the widely used Ozone Local Government ERP suite. The technology is Microsoft .NET coupled with Microsoft SQL database which provides an environment that can be supported by NCC technical staff.

The Ozone Software modules provided by Origen were;

- Ozone Contacts database  
This module provides the Council with a central customer name and address database. Included within the module are extensive tools for managing contact details and merging duplicate records when required. Full NZ Post PAF file integration is also supported.
- Ozone Contact Centre  
All customer contact and requests for service are managed by this module. Requests are classified by customer services staff which automatically initiates relevant workflow actions.
- Ozone Knowledgebase  
Both internal and external (for customer self service via the internet) information databases are provided including frequently asked questions with conditional branching.
- Ozone EDRMS integration  
Querying on related documents from Councils EDRMS with ability to automatically generate and register documents directly from Ozone.
- Ozone QuBE reporting  
Genuine end user “Query By Example” tool that provides users a simple method to extract and analyse data real time.
- Ozone Portal  
Executive information reporting suite that presents high quality graphical output to management staff for performance monitoring.

The solution is designed to manage the receipt of customer service requests from any source. The user has extensive search facilities against a central name and address database to associate the request with. The knowledgebase can assist the user in classification of the request.

Once classified, alerts, related questions, further knowledgebase articles and workflow actions all are automatically associated to enable resolution in the most efficient manner, within agreed timeframes.



A key requirement of the service centre was to provide staff with a complete customer view from a single source, where the data currently existed within a number of varying systems and databases. Origen consultants worked closely with NCC technical staff to develop Webservice API's to retrieve the required information real time and present it through the Ozone client interface.

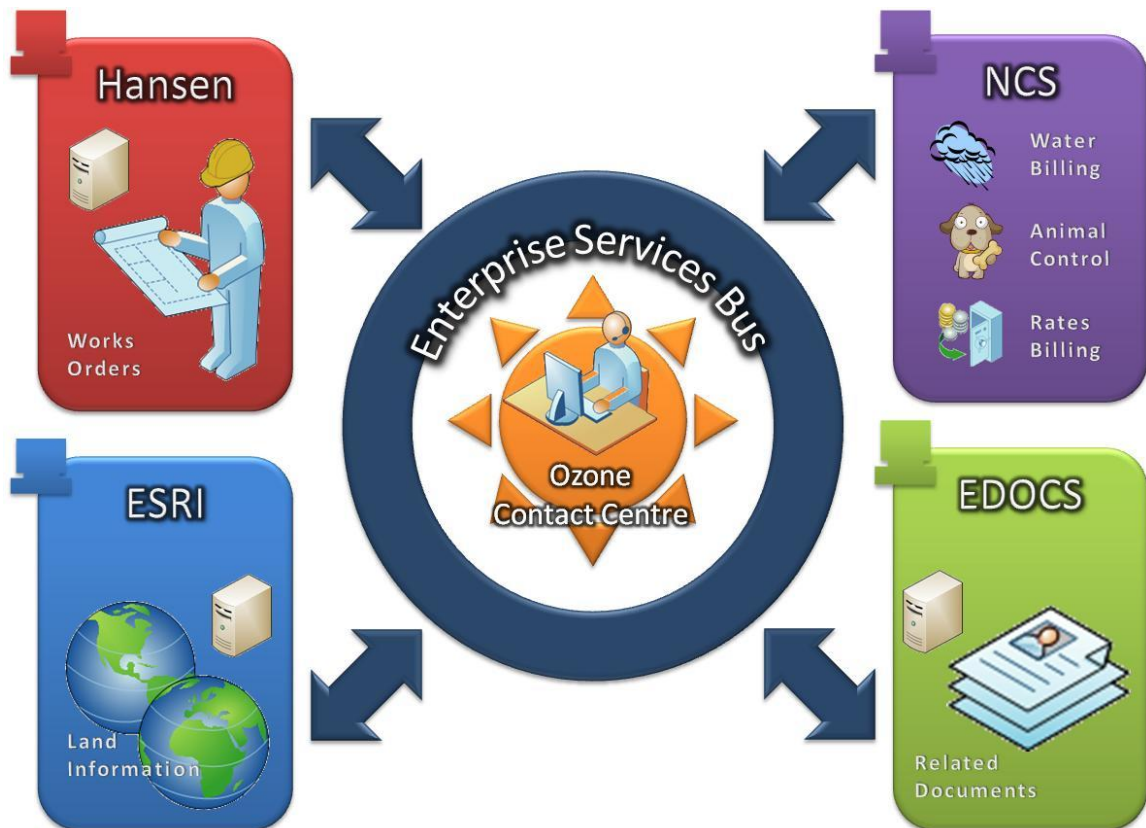
The desired integrations were successfully developed within the project in time for the new Service Centre opening, they included;

NCS – Rates accounts, Water meters and Dog details

ESRI – Location details

HANSEN - Creation of job in Hansen and update of job status in Ozone

E-DOCS - Display of electronic documents



Related services provided by Origen Technology were;

- **Project Management**  
Origen's PRINCE2 qualified project managers use a well established methodology to ensure the project was delivered on time to budget.
- **Data migration**  
Experienced data migration specialists were assigned to extract, transform and load existing data to provide a seamless transition from the various Council data sources.
- **Integration**  
Working closely with Council technical staff Origen developed a suite of webservices to integrate the required systems.
- **Training**  
Origen's staff are specialists in Local Government, in many cases having been previously employed by Councils, all training is relevant with typical case scenarios that are appropriate to the training and easily understood.
- **Implementation Consultancy**  
As Origen is the developer of Ozone all facets of the module are understood in minute detail which greatly assists the implementation process reducing risk.

Simultaneously Council were working on building a new customer services reception, developing content for their knowledgebase, upgrading telephone systems and training new customer service staff.



## Benefits

Nelson City Council has already realized a number of benefits from implementing its new Contact centre principally within the area of improved customer service, which was a primary objective of the project.

- Consistency of service from a single Council service centre
- Consistency of information from a central contacts database
- Improved service request tracking and resolution through automated workflow
- Better information sources available to staff and customers from Ozone Knowledgebase
- Improved communication between Council and Contractors for any action required
- Improvements in KPI reporting
- Greater visibility to management through the use of Ozone Portal

Additionally the software provided by Origen creates a foundation for future enhanced services including online customer requests for service.

The following statement is an extract from Nelson City Council website;

### ***Improving customer satisfaction***

*In the space of eight months customer service has got a big shakeup in Council. Instead of having a hodgepodge of counters and service systems we now have a new Customer Service Centre. Launched in December, the Centre along with new systems to track the completion of requests and contacts will help track how we're going at the crucial job of customer service.*

*What's in it for residents and ratepayers? You get faster, more accurate service from a single source without having to traipse around Civic House, or be transferred from one staff member to the next on the phone.*

*Source: Nelson City Council Website February 2010*