

DAPTC DISCUSSION PAPER

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| Date & Time: | 22 July 2022 |
| Meeting: | Executive Committee |
| Topic: | Website and Customer Relationship Management |
| Presenter: | Neil Wedge |
| Sensitivity: | Open / Controlled / Confidential |

Agenda Item: 3c Website and Customer Relationship Management

Objective: Bring Executive Committee up to date with the following two topics:

1. Provision and scoping for a new DAPTC website
2. Provision of a Customer Relationship Management (CRM) system or software

Background:

Website – the current provider is Vision ICT and they were the previous website provider too. The last refresh took place in 2019 and went live at the start of 2020. The cost of this change was circa £2,750/£3,000. Recently Vision ICT confirmed that they will be moving across to a new platform (Wordpress) and all of their staff will be retrained and in time our site and others they look after would do likewise. Lately we had had a number of issues where the website has been down and hasn't been properly monitored by Vision ICT. There are also some known bugs which make the user experience in adding content quite poor and I suspect one of the reasons for the shift to another platform.

CRM – At the moment all member emails and enquiries coming into our main mailbox account of daptc@dorsetcouncil.gov.uk. These are then triaged and allocated a colour grading depending on the topic and who will respond. This means our Outlook folder is the method we use to prioritise queries and requests from members. This can be problematic in as much we often get new emails on the same topics from that council or requests that go back and forth over a period of time.

Other counties have looked to either establish a suitable CRM outside of their website or have had it integrated. In essence this would mean a Clerk logging in to a website to lodge a request for help which would then be tracked and allocated to someone to complete. All emails relating to that request would be visible with a clear audit trail and alerts for responses by specific timescales. All colleagues get to see the same information, so if due to illness someone is off work the request can be picked up. Furthermore, data could be viewed to measure the nature of requests and turn-around times.

At this point I'd just like to make Executive Committee aware that I propose to get some quotes from suppliers to look at the provision of a new website and CRM. We have provisionally added a budget for the work for 2022/23 which can be removed.

Items for consideration/decision by Executive Committee for 3c:

| No. | Requiring a decision and guidance from Executive Committee | Meeting Date |
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| 1 | In principle are Executive Committee happy for quotes to be obtained without a commitment until the specification is socialised at a future meeting? | 22 July 2022 |

Actions to be agreed:

| No. | Action | Date |
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