

# Tandridge District Council

## Salesforce Implementation: Customer First

### Challenge

In 2018, the Council embarked on an ambitious transformation project - 'Customer First' - comprising a complete service redesign and investment in a modern, cloud-based CRM application to meet its ambitions.

The critical success factors for the project were:



Become a more efficient and effective organisation



Meet the needs and aspirations of its communities



Manage the competing challenges of reducing costs while maintaining or improving services

In addition the council's ICT Strategy was refreshed, moving to adopting cloud-based applications where possible to achieve improvements in services for residents and deliver genuine efficiencies.

### Background

Tandridge District Council in East Surrey, has approximately 90k citizens relying on the services they provide. Some of these services are run and delivered through Salesforce, which is the primary tool for both front and back office service needs.

Following project handover from Methods, an in-house team support the application and the 200+ council users. Citizens can contact the council and access services using both email and the on-line self-service facilities which are enabled by the Salesforce Communities front-end, with automatic case creation (email to case; web to case).

**The goal was to focus all processes and systems centred on the customer in order to deliver a joined-up service across all traditional work areas.**

Key to the project success was the integration of customer journeys, internal processes, and applications across the functional components to give the entire software solution a seamless operational capability, streamlining and standardising processes including reduction in the number of internal emails and manual, paper-based transactions.

The critical success factors for the project were:

- The implementation of a single core platform via a new multi-channel Salesforce CRM system
- Replacement of legacy applications to reduce maintenance budgets
- Enablement of customer self-service with direct integration into the CRM
- Back office systems integration into the Salesforce platform to provide a "single view of the customer".
- A phased, agile delivery to meet the priorities of the business



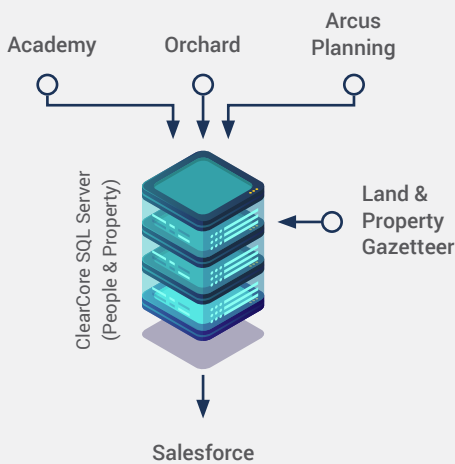
# Tandridge District Council

## Salesforce Implementation: Customer First

### Solution

Methods proposed a Salesforce Service Cloud implementation as the best solution for Tandridge’s needs. Methods suggested a twelve-sprint agile delivery, using a mixed delivery team approach, with part of the team working side-by-side with the Tandridge team, and other team members based off-site to offer additional expertise and cost savings.

During a discovery phase, Methods identified the types of Cases that will be managed by the Council and then began building the solution through configuration and custom code. Methods’ experienced team configured the standard and custom fields that sit across all cases. This was used as a framework for developing the remaining the case types.



For each Service the following were defined:	For each Case Type, we also configured:
Case Record Type	Stages
Case Comments	Path
Email Response Settings	Page Layout
List Views	Integration to legacy and external systems
Queues	Link to Payment Page
Case History	Internal notification emails
Case Reports	External response and notification Emails
Case Dashboard	Reporting

Methods used the following team:				
Delivery Manager	Solution Architect	Functional Consultant	Technical/ Integration Consultant	Off-shore Salesforce Developer to reduce costs

### Results

The project delivered:



On time and to budget



10-12 key services using Salesforce including 5 complex integrations



Single view of the citizen



Citizen service more quickly on first contact



Internal staff reorganisation resulting in significant savings

Internal teams are now fully engaged with the new platform and are actively involved in suggesting new features and improvements to be delivered under BAU maintenance, and to meet the objectives of future possible project phases.

### What was Methods’ added value?

Methods, with their experience and expertise in the Local Government space was able to quickly get up to speed, adapt to the culture and work with the client and staff to deliver a complex project. The Methods team helped train the internal staff. Tandridge are now expert in agile delivery for on-going work and BAU enhancements and are self-sufficient.

#### Office locations:

London | Birmingham | Bristol | Cardiff | Chelmsford | Edinburgh | Manchester | Sheffield

