DIGITAL MODERNISATION

What are we going to cover?

- What is Salesforce - Context
- Why Salesforce was chosen?
- The benefits Salesforce has or will bring?
- A new website
- Benefits
- Salesforce demonstration (Logging a case / Viewing a customer record / Dashboard reporting)
- Q&As and discussion

Salesforce Context

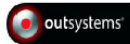"This is not just a phone" Steve Jobs

Who uses Salesforce?

- Public and private sector organizations including local authorities

- Amazon   (No 1 UK brand for customer service and experience)
- John Lewis   (No 4 UK brand for customer service and experience)
- PWC
- UCAS
- DVLA
- Peterborough City Council
- Tandridge District Council

Why Salesforce was choosen?

- Existing CRM was not fit for purpose – Limited functionality to meet user needs

- Existing CRM not scalable internally, i.e. case, WhatsApp/Messenger to case, web to case

- High level assessment platforms

- SF scored significantly better on reporting/data and cost

System	Stage 1 Pass/ Fail	Rationale
salesforce	Yes	Salesforce is a mature product with proven history across both the private and public sector. It has plugins that allow for quick implementation of new functionality. It also allows complete control of the data generated and how it's stored. It is also highly scalable allowing for future growth with commercial CRM capabilities included.
outsystems	No	Highly flexible platform. Would need CMS, Reporting software to wrap around it. It allows for coding within the system. While highly flexible Outsystems would require a large amount of development work and planning in order to ensure scalability and implementation.
Microsoft Dynamics	Yes	Product grown by acquisition. Can be installed on-premise as well as cloud. app market, training and development not as mature as SF. Lots of functionality but requires heavy coding to utilise fully
Firmstep	Yes	Firmstep is a fairly mature low code platform that is widely utilised in the public sector. Fairly flexible and quick to build in, but with a reduced functionality when compared to Salesforce, Dynamics or Outsystems. Small file upload limit which can be problematic for EDRM integration
JADU	No	Jadu is a low code platform similar to Firmstep, it has good mobile functionally and case management. It is less mature than Firmstep with less functionality. It's security model is also not as flexible which may cause issues for scaling

Potential Benefits for the Organisation

- All customer interaction is in one place, i.e. phone, email, social
- Circa 70% of all demand is in one place (low complexity/low risk cases)
- **Generic emails become visible, manageable, and trackable**
- Online web forms to case
- **Live data dashboards**
- **Live Agent**
- Bots (24/7)
- Overall higher customer satisfaction with website
- Ability to update cases remotely in the field – Live updates
- Create capacity to focus on individuals unable to use technology

PUBLICA

Visibly Better Service Design Programme

1. Replacement Container (Waste and recycling)
2. Development management Enquiry
3. Missed Collection (Residential Waste)
4. New Container Request (Waste and recycling)
5. Container Delivery Delays (Waste and recycling)
6. Bulky Waste Booking
7. Councillor enquiries
8. Missed Waste/recycling Collection
9. Purchase Garden Waste Licence
10. General Enquiry - Council Tax
11. Building Control Inspections

12. Abandoned vehicles
13. Fly tipping
14. HR processes

visibly **Better**
by 2020

DEMONSTRATION

Q&As