



Shared
ServicesBC

Knowledge and Relationship Preservation: Customer Relationship Management (CRM) Tool

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Integrated Workplace Solutions
Ministry of Citizens' Services and Open Government

Wednesday May 29, 2013

- Shared Services BC
- Problem To Be Solved
- What is CRM
- SSBC Solution
- Next Steps

- SSBC is part of the Ministry of Citizens' Services and Open Government
- SSBC provides:
 - Integrated Workplace Solutions
 - Technology Solutions
 - Logistics and Business Services
 - Corporate Services

Corporate knowledge and customer relationships put at risk by staff loss through:

- Recruitment
- Retirement
- Resignation
- Reorganization
- Restructuring

Customer communication, history and data stored inconsistently:

- Corporate and personal email files
- Corporate and personal EDM files
- Outlook calendars
- Paper notebooks and files
- Minds of departing staff

Social Media

Company's Organization

Sales Reps, Executives, Support Resources

Reporting Dashboards

Security

Interactions 360°

Past, Present, Planned notes, correspondence, email, meetings, issues...

*Mobility
Unified Communications
Contact Centre*

Accounts

Contacts

Service Catalogue

Service Agreement

Scheduling / Calendar

Past, Present, Planned tasks, appointments, meetings

*Workflows
(task assignment)*

Escalations

Presence Mgmt

Marketing/Forecasting

- Leads Campaigns
- Opportunities
- Quote Sales Quota
- Sale
- Service Case
 - ✓ when
 - ✓ what
 - ✓ who
 - ✓ action plan
 - ✓ status

*Company Knowledge
Solutions Library*

- Solving the problem with CRM software
- Implementing subset of functionality:
 - Accounts
 - Contacts
 - Marketing (campaigns, leads, opportunities)
 - Cases
 - Internal Social Collaborative Tool
 - Integration to Outlook
 - Plus reporting, dashboards and security

- Solution procured through RFP
- Software as a Service (SaaS)
 - Reduced capital cost
 - Reduced maintenance cost
- Protection of Privacy
 - Personal information is not shared
- Single instance for entire Ministry
 - 360 degree view of business with a customer

Fiscal 2013/14

- Focus on Non-mandated Customers
- Develop and document business processes
- Develop and configure reporting
- Extend CRM to Mandated Customers
- Develop plans to extend throughout SSBC
 - Technology Solutions
 - Logistics and Business Services