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

Stephen Marguet, Executive Director
Real Estate Policy and Performance Management

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
• 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
Next Steps

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