COMMUNITIES AND LOCAL SERVICES SCRUTINY COMMITTEE
10 April 2025

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEMS (CRM)

SUMMARY REPORT

Purpose of the Report

1. To provide members with information about the capabilities of our Customer Relationship Management (CRM) systems.

Summary

1. Members asked if it was possible to configure existing systems spanning several service areas into a single point of access to accept reports from the public and from councillors, and automatically provide updates to both groups of people that include job numbers, job allocation status, date started, and date completed.

2. The council uses over 17 commercial systems to meet different service needs. Each system performs different functions. Some have customer facing interfaces, some have back office workflow functions, and some integrate with external functions such as payment providers and mapping.

3. For the purpose of this report, and based on the scope of the request, it is assumed the systems of interest to members are those that enable people to report issues. The report therefore focuses on the systems used to report antisocial behaviour issues, environmental issues, highways issues, and housing repair requests.

4. There are four CRM type systems used by the council to capture the issues highlighted above, with more details about the individual systems available throughout the report. At present, most of the systems are not capable of being integrated with other systems such as My Darlington which is an in-house product built to combine system access where possible. Systems are not regularly replaced due to the cost and staff resources required to do so, but when they are replaced, a factor taken into consideration is their ability to integrate with other systems.

5. Due to the General Data Protection Regulation (GDPR) sharing some case information with councillors is not permitted, however there are some instances whereby details of reported issues are anonymised and published via online maps. Details of these are available in the main report.

Recommendation

6. It is recommended that :-

(a) Members note the content of the report.

Neil Bowerbank
Head of Strategy, Performance and Communications

Council Plan	The use of corporate ICT systems supports the Council Plan's core principle of efficient and effective use of resources.
Addressing inequalities	N/A
Tackling Climate Change	N/A
Efficient and effective use of resources	Effective use of ICT systems can help reduce the cost of providing council services through automation and other efficiencies.
Health and Wellbeing	N/A
S17 Crime and Disorder	N/A
Wards Affected	N/A
Groups Affected	N/A
Budget and Policy Framework	N/A
Key Decision	No
Urgent Decision	No
Impact on Looked After Children and Care Leavers	N/A

MAIN REPORT

Information and Analysis

2. Members asked if it was possible to configure existing systems spanning several service areas into a single point of access to accept reports from the public and from councillors, and automatically provide updates to both groups of people that include job numbers, job allocation status, date started, and date completed.

3. Members were of the view that this is possible, not too complicated to achieve, not expensive to implement, not groundbreaking, and has been achieved by most companies. It was also suggested that this is the way that most local authorities monitor casework, and so there should be plenty of examples.

4. A request was made for a briefing on how jobs are captured and monitored, and how feedback to residents is managed. There is a specific interest on how councillors can understand what is happening without having to email and chase for updates.

5. It was proposed that an efficient management system where everyone is aware of the status of any jobs could mean less time for officers having to check back and respond to councillors and the public if the system were to be automated.

Overview of systems, their functionality, and supplier development plans

6. The Digital Darlington Strategy 2025-30 contains a workstream that aims to maximise the benefits of our existing ICT systems, both customer facing and back office elements. This is

not a new ambition, rather it has been ongoing for many years, but is now formally captured as a key priority for the council within the strategy.

7. The council has over 17 corporate ICT systems, some of which have case management features. These systems offer access to a very broad range of services from reporting fly tips through to applying for school places and managing gym memberships. There is a page on the Darlington Borough Council website that lists most of the online functions currently provided by the council www.darlington.gov.uk/reportit (link correct at the time of writing this report). For the purpose of this report, it is assumed the interest is on, antisocial behaviour, environmental services, highways, and housing services.

8. Case management systems can offer a suite of functionality. A public facing **online portal** provides the customer with the ability to report an issue and in some cases the choice to set up an account so case progress can be tracked. Once an issue has been reported, the CRM provides a **workflow** through which the different stages of resolving the problem are progressed. In some cases, workflows are **integrated with external applications** such as mapping, asset management, and payment systems. Depending upon the nature of the issues being reported, some systems provide a **publicly visible report**, often in map format, of the cases and their current status.

9. The council has limited influence over system supplier development roadmaps. We can and do request new features such as improvements to customer portal functionality, but we have little control as to if and when they are introduced. Typically, the market is dominated by a handful of systems providers and subsequently the lack of competition limits our ability to force new features and drive down costs. Furthermore, there are significant costs and resources needed to switch systems so strong business cases are needed for any major changes.

10. Some systems offer more options than others when it comes to the ways in which people can report issues, the type and frequency of progress updates that customers can receive, and the ways in which customer accounts work. Ideally, we would like to be able to offer one account that would enable customers to access all council services but unfortunately given the hundreds of services provided by the council that rely of different systems this isn't currently possible.

11. Following research, a software solution has not been identified that can either (1) provide a single system for all the different reporting needs, or (2) can combine the four systems used by the council for this purpose. Each of the systems used by the council has bespoke functionality and, in some case, bespoke integrations with other products.

12. Some system suppliers allow their customer portals to connect with other 3rd party portals therefore reducing the number of online accounts customers need to access council services. Where this is possible, our in-house team has already developed the integrations. For example, a **MyDarlington** account provides access to **VERINT** online forms which link to several environmental services, information about waste collections days, and bookings for bowling at the Dolphin Centre. At present, **SYMOLOGY** which is used to report highways related issues, and **MRI Repairs** which is used for housing repairs cannot be integrated with MyDarlington. Systems are not regularly replaced due to the cost and resources involved, but when they are, one of the features considered as part of the options appraisal include the capability to integrate accounts. If any systems are upgraded

and have the capability of integrating with MyDarlington, this is something we would look to implement.

13. Where systems are capable of providing customers with progress reports relating to the issues they have raised, business processes need to be aligned to make this work. Some progress reports are sent privately to the customer, while others are available publicly such as via online maps. **Appendix 1** provides an overview of the systems related to this request from members.

14. The GDPR governs what we can do with the personal data that we hold about customers, including details of reports that we have received. The regulations do not permit the council to share personal data with councillors.

15. In some cases, personal data within the reports can be removed allowing for some of the reported information to be shared publicly. Examples of this includes the following. *Note – links correct at time of writing the report.*

   (a) 12 highways related issues https://highwaysreporting.darlington.gov.uk/
   (b) Smashed glass - https://selfserve.darlington.gov.uk/form/auto/sses_glass
   (c) Dead animals - https://selfserve.darlington.gov.uk/form/auto/sses_dead_animals
   (d) Fly tips - https://selfserve.darlington.gov.uk/form/auto/sses_flytip_report
   (e) Public bins - https://selfserve.darlington.gov.uk/form/auto/sses_public_bins

Conclusion

16. Ideally, from the perspective of our customers there would be a single CRM system linked with all our services. Unfortunately, given the wide ranging services provided by the council and the different workflows and integrations associated with our services there isn't currently a technical solution that integrates all of our services.

Neil Bowerbank
Head of Strategy, Performance and Communications

Appendix 1

System	Functions	Account integration capability	Case progress updates	Features on developer roadmap
VERINT	**To report issues with:** - Broken glass - Dead animals - Fly tipping - Public bins - Lost, stray, dangerous dogs - Needles - Planning breach - Noise complaint *For reference, other functions within the VERINT system include.* **To apply for:** - Assisted bin collections - Personal searches - Skip permits - Allotments - Blue badges - Garage tenancy - Temporary Traffic Regulation Order (TTRO) - Street Naming and Numbering - Section 50 - Public Road Opening (PRO)	Yes – integrated with MyDarlington	Where an email address has been provided, acknowledgement is sent containing reference number and brief case details. Open cases will show on the map with the aim of avoiding duplicate reports. Closed cases are not shown on map to avoid it looking too busy. No personal information or free text is shown on map pin, only date raised, ref number and information from radio buttons or drop down lists. - Broken glass - Dead animals - Fly tips - Public bins Progress updates are not sent out as environmental reports are often resolved quickly. Case closure emails are not currently sent but work is ongoing to address this.	A process management module is in development to send automated emails (where a valid email address is provided as part of report) to inform customers the case has been closed / resolved. A risk of homelessness referral form is in development with Housing Options.

	Freedom of Information (FOI) requests **To book:** - Bulky waste collections **To order:** - Garden waste subscriptions - Replacement refuse and recycling equipment - Replacement birth, death, and marriage certificates - Local authority land search **To submit:** - Wedding bookings - Wedding questionnaire - Corporate complaints - Building control applications			
REACT	To report issues with: - Anti-social behaviour - Abandoned & untaxed vehicles - Begging - Fly tipping	Partially integrates with My Darlington via web forms	Acknowledgement of cases added are sent out via mail or email (where provided). ReAct integrates with the ASB App (currently being trialled) which allows two-way communication with customers within ReAct and the ASB App.	We are waiting for Verint to roll out an API connector that can link to the ReAct system. This issue has been raised with Verint and is on the roadmap for future development, but no date has been supplied yet for its development.
SYMOLOGY Insight	To report issues with: - Bridges - Cycleways	Cannot currently be integrated with	An acknowledgement is automatically sent to the customer when the report submitted.	SYMOLOGY is replacing Insight with a new product called

	- Obstructions - Pavements - Public rights of way - Roads - Roadworks - Signs - Streetlights - Traffic signals - Vehicle access - Verges	MyDarlington or other 3rd party account systems.	Customer is notified via email once work on the issue has commenced. The current status of requests (for 12 report types) is displayed on an online map. Case closure emails are not currently sent due to system limitations. It is anticipated that future upgrade will address this constraint.	Aurora, which is expected to happen during Autumn 2025. New functionality is still to be confirmed, but it is anticipated there will be greater flexibility with the number of emails that can be sent to customers and the information contained within them.
MRI Repairs	Appointment booking system for repairs to our residential properties.	Cannot currently be integrated with MyDarlington or other 3rd party account systems.	System to request a repair. Requests are currently added to the MRI system by council staff following a phone call or email enquiry from the tenant. Text message reminders are sent to the tenant closer to the appointment date to ensure they are at home.	Building upon the text message reminders, future features are expected to enable the tenant to track the location of the repair engineer (similar to the principle of being able to track the location of a delivery driver). Darlington Home Online is a housing portal for tenants through which they can access account information. There are plans to expand this to allow tenants to be able to request minor repairs (linking in with MRI repairs) so tenants will have the option not to phone or email requests.