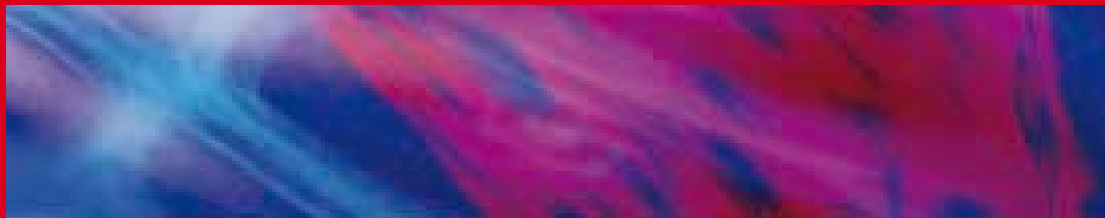


Mid-Term Review of CRM Partnership Working

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Executive Summary

The National Customer Relationship Management (CRM) Programme is co-ordinated by the Improvement Service and West Lothian Council as lead council and exists to increase the intensity of collaboration around CRM across Scottish local government that will result in demonstrable improvements in customer and organisation outcomes.

Under the programme, a Partnership approach involving the Improvement Service, Lagan, West Lothian Council and a national steering group, has been established. The partnership has been successful in developing an exciting value proposition for councils, commercially and collaboratively, open to all Scottish councils to allow them to implement Lagan's enterprise caseload management solution in order to manage customer interactions, service and information requests.

A short review of the Partnership was commissioned by the Improvement Service to identify and make recommendations and suggestions for improvement. This report presents the findings of this review.

Recommendations

This review has provided valuable insight into how the CRM partnership is operating and identifies areas where it could be improved. In order to better work together this review clearly identified a need to:

- Define and agree how partnership members wish to work together
- Clarify and agree a medium to long term strategic vision, identifying what the partnership aims to do post-implementation
- Set specific short-medium term targets and measure delivery against these
- Better support a culture of problem solving rather than attributing blame
- Identify a key decision maker within local authorities
- Organise further team building events, perhaps focused on operational issues
- Explore further supports for the CRM project, such as establishing an implementation team or providing specific project planning and management support
- Support greater coordination and communication between the various national programmes with links with the CRM project

This report will be shared with all members of the partnership and will form the basis of discussions about how to better work together going forward. The National CRM Board will identify specific areas for action.

Key Findings

- All respondents were 'clear about what the partnership is trying to achieve'
- 82.4% of respondents strongly agreed or agreed that their own organisation had a clear vision for the CRM project
- Different views about working together were highlighted by local authorities and Lagan. Local authorities tended to identify and often want a relationship with Lagan based on a customer-supplier model, whilst Lagan believed genuine partnership working was essential for successful implementation of the CRM project.
- Respondents noted a lack of a medium to long term strategic vision, meaning there was some confusion about what the partnership would aim to do post-implementation
- 87.6% strongly agreed or agreed that they were clear about their responsibilities but just over half of respondents were clear about the responsibilities of the other partners (53%)
- Only 35.3% of respondents agreed that partners have realistic expectations about what they could deliver
- Over a third of respondents strongly disagreed or disagreed that changes to the plan are clearly negotiated (35.3%)
- 41.2% of respondents strongly agreed or agreed that changes to the plan are clearly communicated to all partners. However, almost a quarter of respondents (23.5%) strongly disagreed or disagreed with this statement
- Several interviewees revealed that difficulties were often resolved following unnecessary and unconstructive arguments, where the focus was on attributing blame rather than problem solving
- Within local authorities no one person has an overview of all elements of the CRM project, making it difficult for any person to take decisions on behalf of the local authority
- All interviewees commented that a key issue around poor performance was that it was difficult to get the right people in the right place at the right time
- The procurement process and negotiation of the terms of the contract were commonly mentioned as examples of where the partnership had performed well
- A high percentage of respondents believed that the governance of the CRM partnership was excellent or good (76.5%)
- Over half of respondents believed that communication in the CRM partnership was good (52.9%). However, just under a quarter (23.5%) identified that communication was poor

1. Introduction

A partnership approach involving the Improvement Service, Lagan, West Lothian Council (as lead council) in conjunction with the CRM Steering Group, has been established to take forward the National CRM Project's direction and delivery.

The project's vision is to:

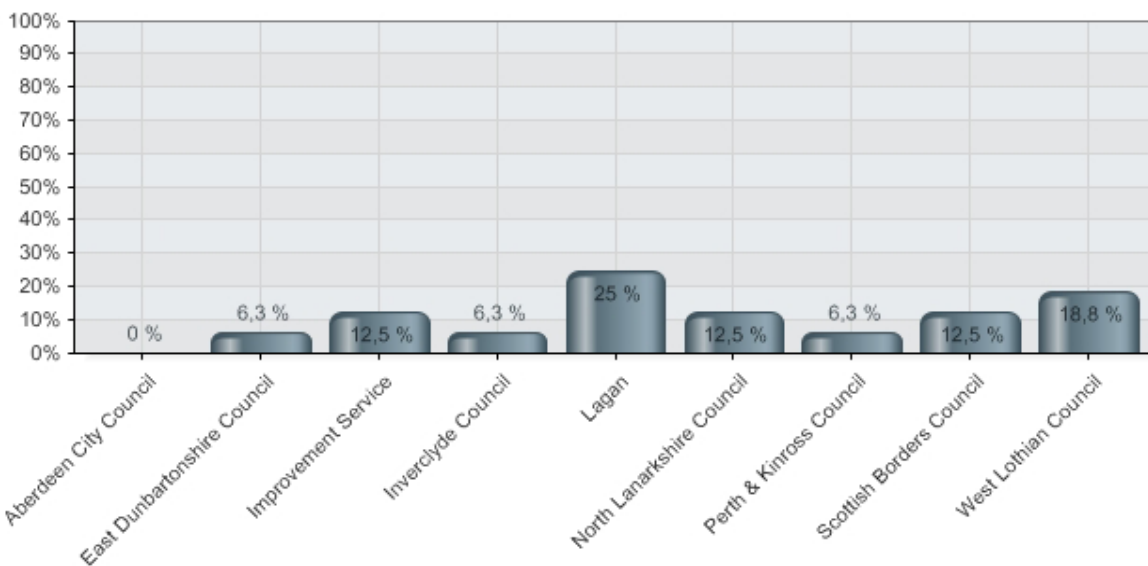
**'increase the intensity of collaboration around
Customer Relationship Management across Scottish local government
that will result in demonstrable improvements in customer and organisation outcomes'**

Research suggests that there are relatively straightforward ways of improving the performance of any partnership and that even effective partnerships require constant nurturing. A short review of the Partnership has been commissioned by the Improvement Service to identify and make recommendations and suggestions for improvement. These issues were explored through a short electronic survey and telephone interviews with partners involved at a number of levels in the project.

2. Approach and Response

An electronic survey was distributed to 19 individuals involved in the partnership which resulted in a response rate of 89.5%. At least one survey was returned from each partner involved in the partnership with the exception of Aberdeen City Council.

Table 1: Response from partnership organisations



The survey asked whether participants would be willing to participate in a telephone interview to explore in greater depth their experiences of partnership working. Sixty-Five percent of respondents expressed a willingness to be interviewed and 7 respondents were interviewed during March 2008. The interviewees represented a cross-section of those involved in the partnership; 2 from Lagan, 1 from the Improvement Service and 4 from local authorities.

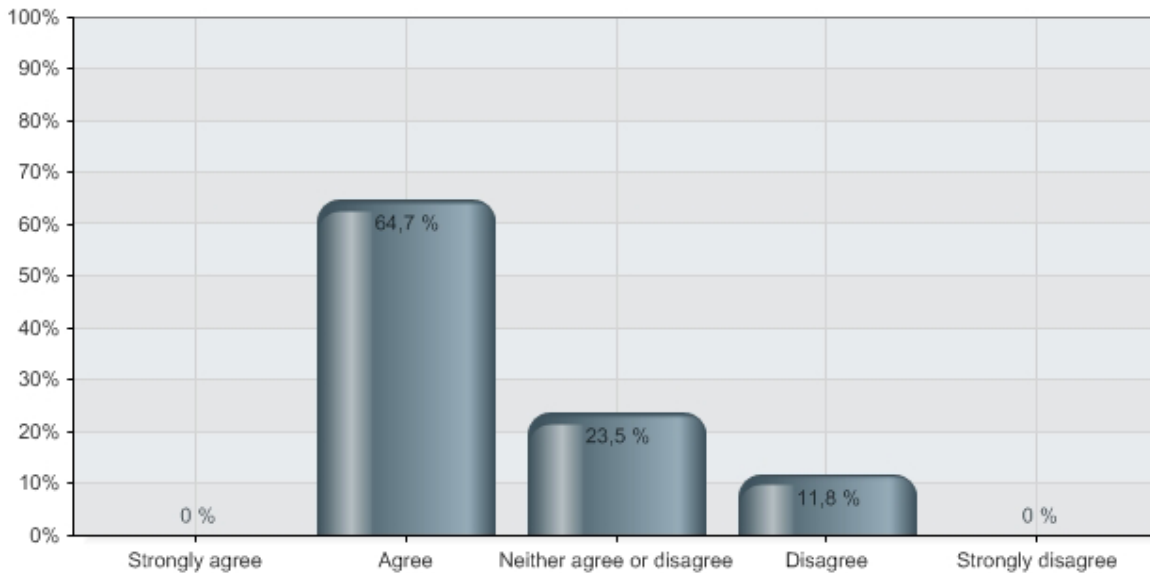
3. Perceptions of partnership working

Respondents were asked to indicate their level of agreement with a range of statements about the partnership (from strongly agree to strongly disagree). These explored respondents' perceptions about issues such as the aims of the partnership, vision, responsibilities, expectations, timescales and dispute resolution.

3.1 Partnership Aims

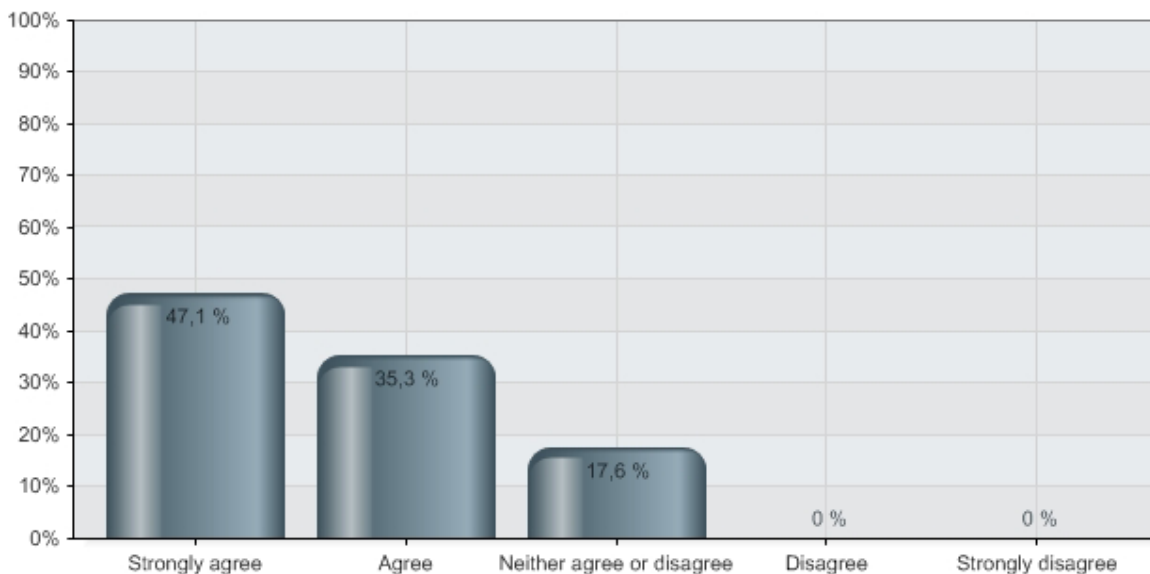
All respondents either strongly agreed or agreed that they were 'clear about what the partnership is trying to achieve'. The majority of respondents (64.7%) also agreed that there is common agreement amongst partners about the aims of the partnership (see table 2).

Table 2: There is common agreement amongst partners about the aims of the partnership



Within their own organisations, survey respondents tended to feel that their organisation had a clear vision for the CRM project, 82.4% of respondents strongly agreed or agreed with this statement (see table 3).

Table 3: My organisation has a clear vision for the CRM project

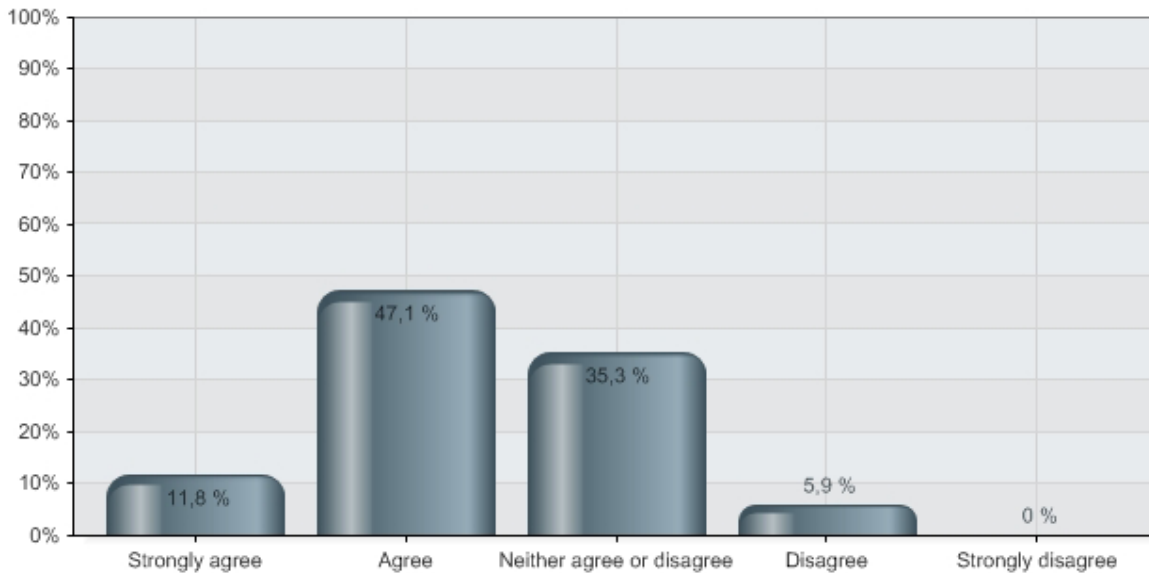


Despite the apparent clarity around the partnership aims, the telephone interviews revealed a more complicated story. Partnership members were clear about what the overarching aims and the specific deliverables in the early days of the partnership, around procuring software etc. However, there was some confusion about what the partnership would aim to do post-implementation and there was a sense that, whilst there was considerable energy currently focusing on implementation, there was currently a lack of a medium to long term strategic vision.

3.2 Commitment

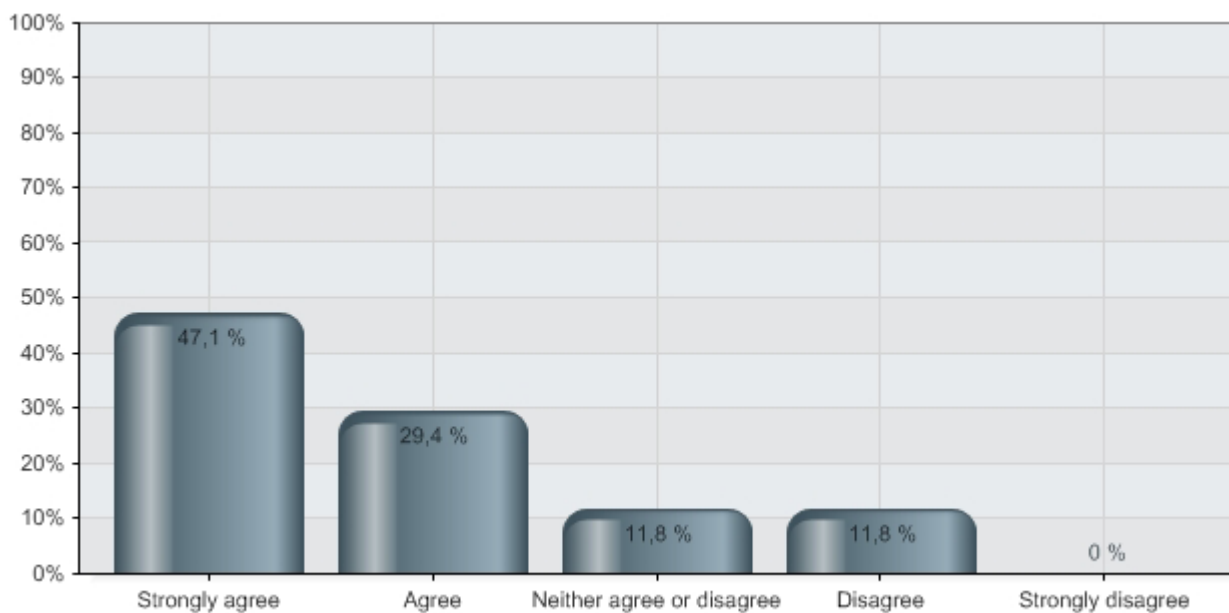
Just under 60% of respondents either strongly agreed or agreed that there is strong commitment to achieving the project aims across all partners (58.9%). Interestingly, over a third of respondents indicated that they neither agreed nor disagreed with this statement (35.3%). This may be explained in part by the fact that several members have recently joined the partnership as, in the open questions, some respondents mentioned that they did not yet feel able to comment on some of the issues raised in the survey.

Table 4: There is strong commitment to achieving project aims across all partners



Within the partner's organisations the majority of respondents believed there are visible champions driving the CRM project, 76.5% strongly agreed or agreed (see table 5).

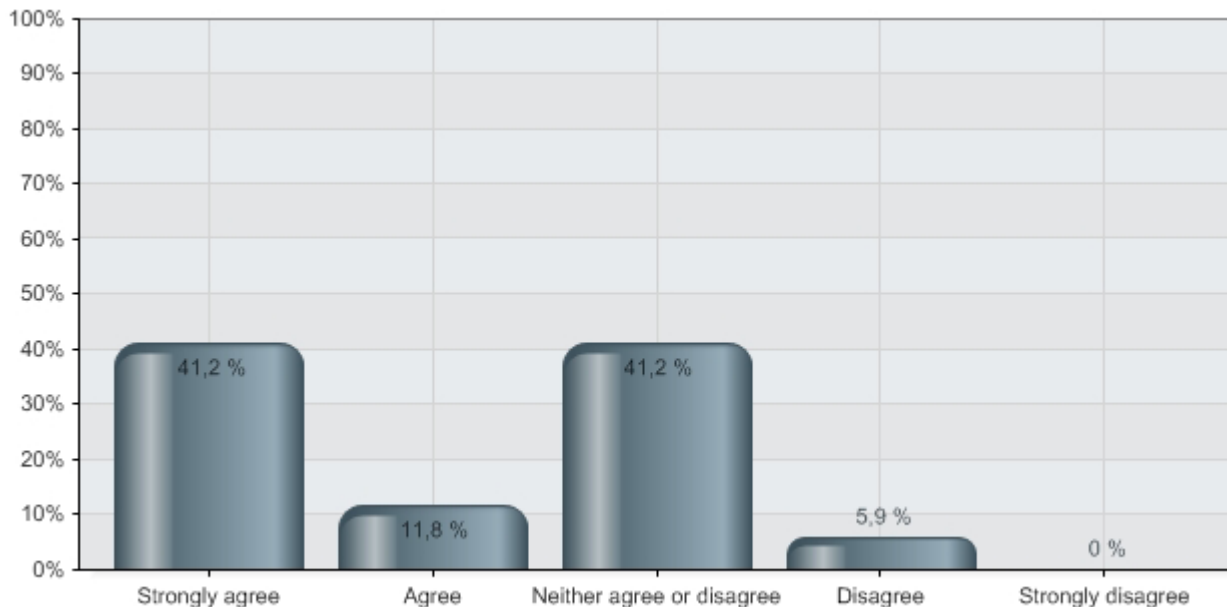
Table 5: There are visible champions driving the CRM project within my organisation



3.3 Responsibilities and Expectations

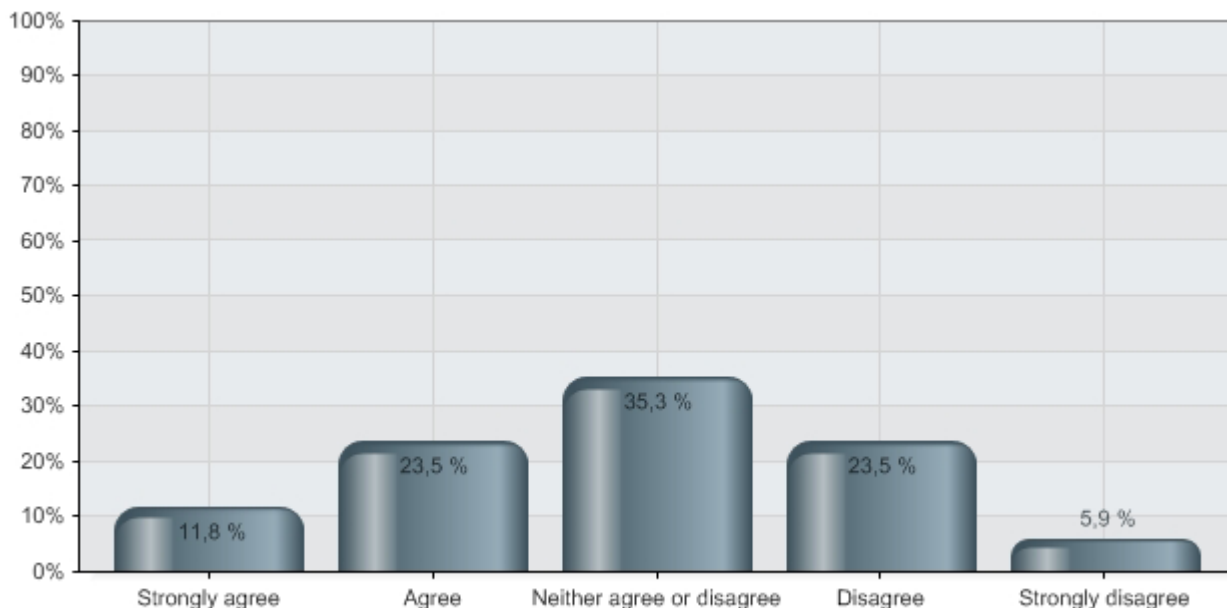
87.6% of respondents strongly agreed or agreed that they were clear about their responsibilities in delivering the project. However, there was slightly less clarity about the responsibility of other partners. 53% of respondents either strongly agreed or agreed that they were clear about the responsibilities of other partners. A high percentage of respondents neither agreed nor disagreed that they were clear about the responsibilities of others (see table 6). One interviewee commented that over the course of the CRM project responsibilities had become clearer and noted that work was currently being undertaken to clarify roles further.

Table 6: I am clear about the responsibilities of other partners



There was less agreement about expectations. Only 35.3% of respondents agreed that partners have realistic expectations about what they could deliver. Twenty nine percent of respondents either disagreed or strongly disagreed that partners have realistic expectations, and 35.3% neither agreed nor disagreed with the statement (see table 7).

Table 7: Partners have realistic expectations about what I can deliver



In terms of timescales, the most common response was that they neither agreed nor disagreed that timescales for project delivery are realistic (47.1%). This could indicate that some timescales are realistic whilst others are not, making such a statement difficult to agree or disagree with, or perhaps respondents have not yet been involved in the partnership in terms of project delivery. A slightly higher percentage of respondents strongly agreed/agreed compared to strongly disagreed/disagreed that timescales for project delivery are realistic (29.4% and 23.5% respectively).

Lagan respondents commonly mentioned that they perceived a lack of appreciation about what is required for Lagan to meet their timescales; for instance, if a local authority is just two days behind schedule, this can affect their timescales by weeks as the person required to do the work might not be available immediately due to their commitments on other projects. However the key issue here seemed to be communication, as one Lagan interviewee explained;

If we are told earlier about such difficulties,
we can reprioritise and organise things differently to ensure timescales
are only pushed back by a couple of days. We can reschedule work if we know.

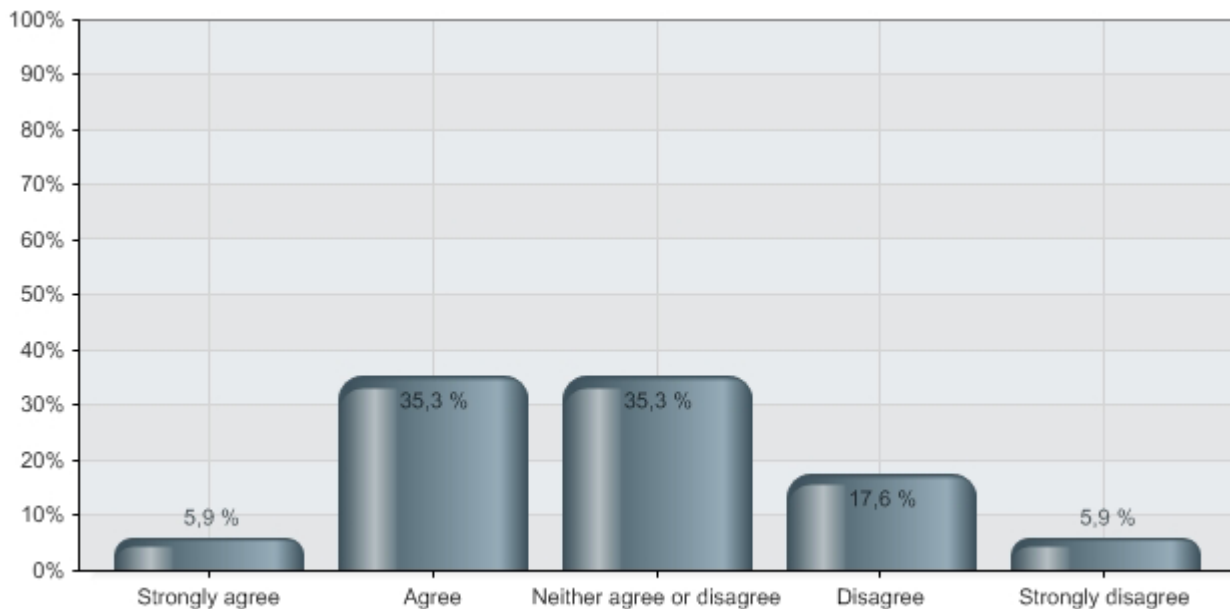


3.4 Changes to Plan

Over a third of respondents disagreed that changes to the plan are clearly negotiated (35.3%) the same percentage neither agreed nor disagreed with the statement.

41.2% of respondents either strongly agreed or agreed that any changes to the plan are clearly communicated to all partners. However, almost a quarter of respondents (23.5%) strongly disagreed or disagreed with the statement (see table 8).

Table 8: Changes to the plan are clearly communicated to all partners



3.5 Project Delivery

The most common response to the statement 'to date all partners have delivered what was agreed' was neither agree nor disagree (41.2%), followed by agree (35.3%) and disagree (23.5%). The majority of respondents neither agree nor disagree that where delays or failures to delivery occur these have been adequately explained.

3.6 Difficulties and resolving them

When respondents were asked whether the partnership had faced difficulties which present a barrier to effective project implementation and delivery, half of respondents said yes and half said no. Those who identified that such difficulties existed were asked to provide details. A range of issues was mentioned including:

- Local priorities change and often steering group members do not have the authority within their organisation to make commitments on their organisations behalf
- Internal communications within councils could be improved to better explain the local context within a national one
- There are times when the relationships revert to customer/supplier with the IS acting as referee (rather than a true partnership)

Within local authorities it is clear that the CRM project cuts across the organisation and so a range of internal partners need to be involved. This clearly can present issues in terms ownership of the project within the authority. As one interviewee pointed out,

- There is no-one (within any local authority) who understands all the relationships involved (in delivering the CRM project)

Resource availability within local authorities for the project was frequently mentioned as an issue, particularly as staff were often involved in the CRM project in addition to their “day job” and these individuals were also frequently involved in other national or Improvement Service-led projects. This caused problems in terms of decisions being made on time, or the right people making the decision. Interviews revealed that, where there were specific difficulties, this resource issue was often the root cause of them.

Issues about trust were commonly mentioned by all members of the partnership, particularly by Lagan, who did not always believe they were viewed as partners by other members of the partnership. All local authority interviewees were positive about their engagement with Lagan, one interviewee in particular was very complimentary about Lagan’s openness about issues and potential issues. However, the local authorities and Lagan appeared to view the CRM partnership in different ways.

Two of the four local authority interviewees noted that they saw the relationship with Lagan as fundamentally a customer - supplier relationship, primarily due to the different aims of the public and private sector organisations. From the local authority perspective it was not a problem if the relationship with Lagan looked more like a customer-supplier relationship than a partnership. However, the two Lagan interviewees felt that a partnership approach was essential to ensure successful implementation of the CRM solution, identifying that Lagan and each local authority needs to share ownership of the local CRM projects. A couple of interviewees also noted that working in this type of partnership represented a new way of working for some within local authorities and so perhaps Lagan’s experience is understandable given this context.

Despite the range of difficulties faced, over half of all respondents felt that there are effective mechanisms for resolving difficulties (52.9%), though over a third of respondents neither agreed nor disagreed. Several interviews revealed that difficulties were often resolved following unconstructive arguments, where the focus was on attributing blame rather than on solving problems. However, interviewees tended to believe that, whilst this mode of operating did not prevent issues being resolved, it simply took longer to resolve and rather it was just unnecessary and unhelpful in engendering trust and clear communication.

3.7 Partnership successes

Respondents were asked to give an example where the partnership’s performance was good and explain why it worked well. Of the twelve respondents that completed this question five respondents mentioned that the procurement process and negotiation of the terms of the contract was an example of where the partnership had performed well (41.7%):

- Procurement - aim was clear, everyone agreed, timescales etc also clear and achievable
- To initially get councils to work together and secure very competitive prices and clear framework for all Scottish Councils
- Throughout the procurement process - efficiencies achieved.
- Negotiations of terms for the contract
- Producing a common specification for the CRM

This was echoed in the interviews, where representatives from local authorities in particular highlighted the real achievements of the partnership in developing a common specification and jointly purchasing Lagan software for a competitive cost. It was also mentioned that this was achieved for all members of the partnership at a faster pace than other councils had been able to purchase CRM software for their council acting on their own behalf. Respondents tended to identify common needs and aligned aims as the reason for this specific success.

In addition, the access to Lagan and support from the Improvement Service was complimented by a couple of respondents. The Away Day (for all the partnership members in January 2008) was mentioned as a success, primarily because

**all key stakeholders attended and participated
fully and the formal and informal feedback was very positive**

One respondent also highlighted that the partnership was particularly responsive, able to resolve problems when they arise.

3.8 Poor performance

Respondents were also asked to give an example where the partnership's performance was poor and explain why this occurred. Interestingly, a range of issues were highlighted but only issue resolution was mentioned by more than one respondent.

- Issues with desktop rollout whereby the supplier offered to help and ended up owning the issue which was then difficult to resolve due to customer's internal issues.
- The partnership performance with issue resolution has been extremely poor. This may be down to a lack of issue ownership, drive and determination to push the issues to the top of the project.

Other comments about areas of poor performance included:

- Delays in securing support from councils to include IS representation on their local project boards undermines effort to co-ordinate at a national level
- Supplier/customer relationship becomes paramount when expectations (however unrealistic) are not met
- Some councils are probably looking for guidance and leadership from the partnership and this has been difficult to achieve without seeming to be dictating from the centre
- Not sure that the required state of readiness was initially known by all councils - and that may have impacted on potential timescales
- Members Caseload - despite having demand from partnership members, the project has not advanced

All interviewees commented that a key issue around poor performance was that it was difficult to get the right people in the right place at the right time. In fact some local authority interviewees highlighted that there is no one person who is able to take decisions for the organisation as a whole, so there is no "right person", which can lead to poor performance and prevent decision making.

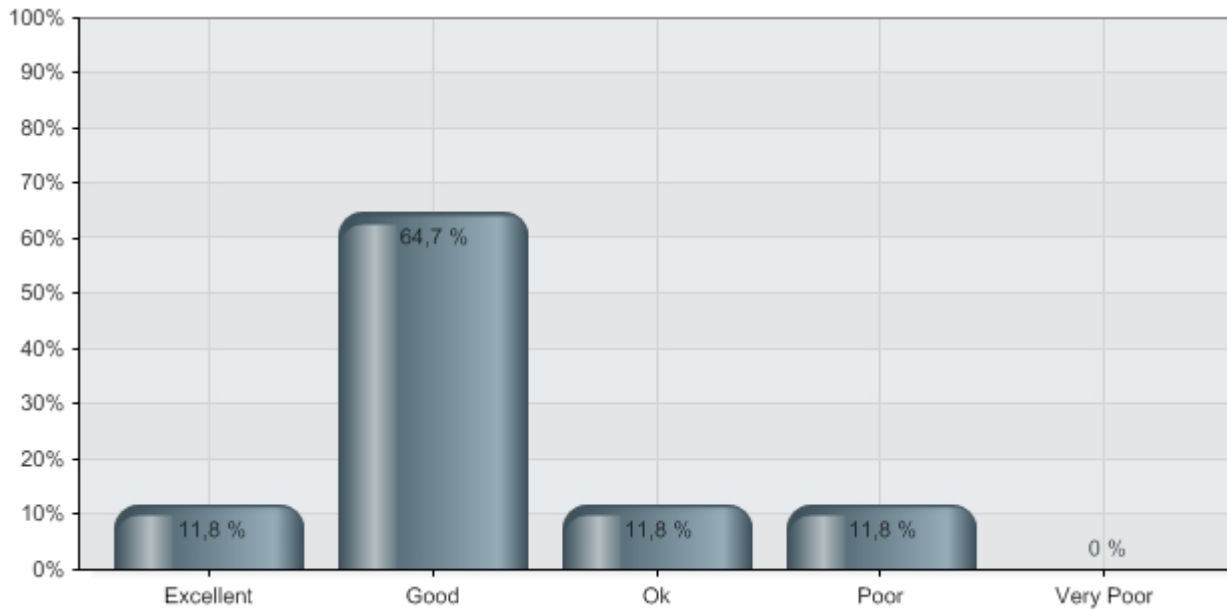
4. Rating partnership performance

Respondents were asked to judge four different elements of the CRM partnership's performance: governance, communication, leadership and implementation and delivery. Respondents were asked to rate these elements as excellent, good, ok, poor or very poor.

4.1 Governance

A high percentage of respondents believed that the governance of the CRM partnership was excellent or good (76.5%). Of the four aspects of partnership working explored in the survey respondents rated governance most highly. Though interviewees raised concerns about governance, for instance, one interviewee noted that a number of local authorities have not set-up project boards to allow for discussion and resolution of local concerns.

Table 9: Rating partnership performance on Governance



4.2 Communication

Over half of respondents believed that communication in the CRM partnership was good (52.9%). However, just under a quarter (23.5%) identified that communication was poor; meaning that of the four elements of partnership working performance on communication was judged to be the weakest. Interestingly, those respondents who did not believe the partnership had faced difficulties which present a barrier to effective project implementation and delivery (50% of respondents) were asked why they felt such difficulties were avoided. Three respondents provided an explanation, all of which related to good communication:

We talk to one another - we have everything to gain and very little to lose by co-operating with one another
 (North Lanarkshire Council)

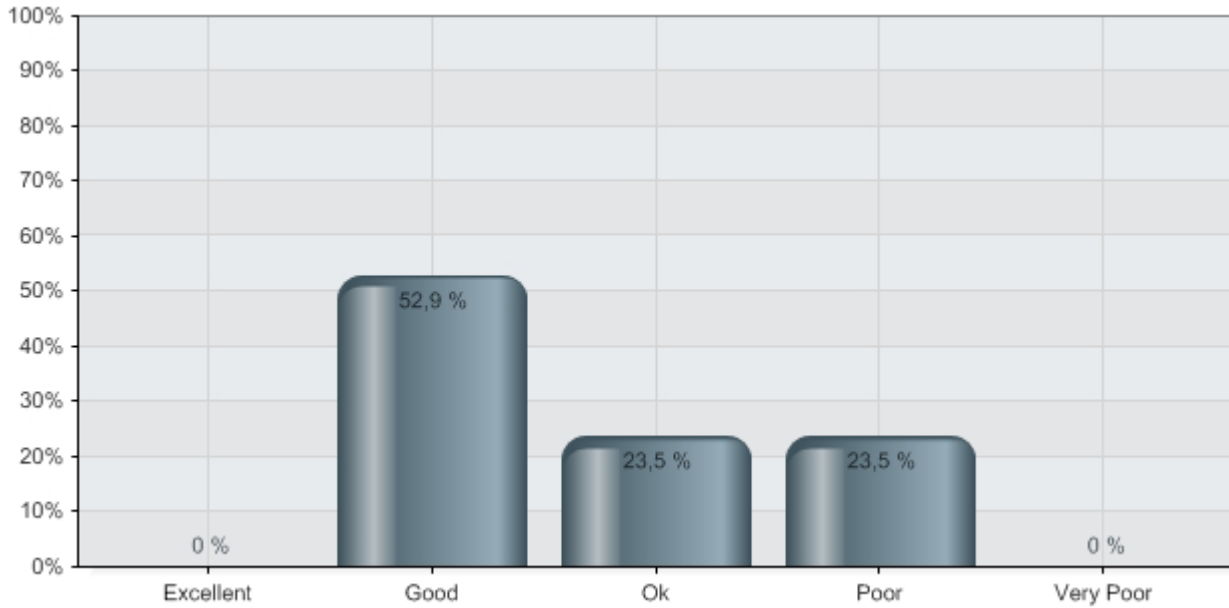
Through regular communication, workshops and seminars
 (Inverclyde Council)

Regular communications - Project Boards, Away Day, ongoing daily communication.
 (Lagan)

A number of interviewees highlighted the benefits of the away day to improve communication, trust and team building. In addition several interviewees thought it would be useful to hold further such events, one interviewee noted that in particular it would be useful to focus an event at the operational level.

Those who have links to the partnership but are not part of the framework contract noted that communication was poor with those outside the partnership, 'We don't hear much from the partnership'.

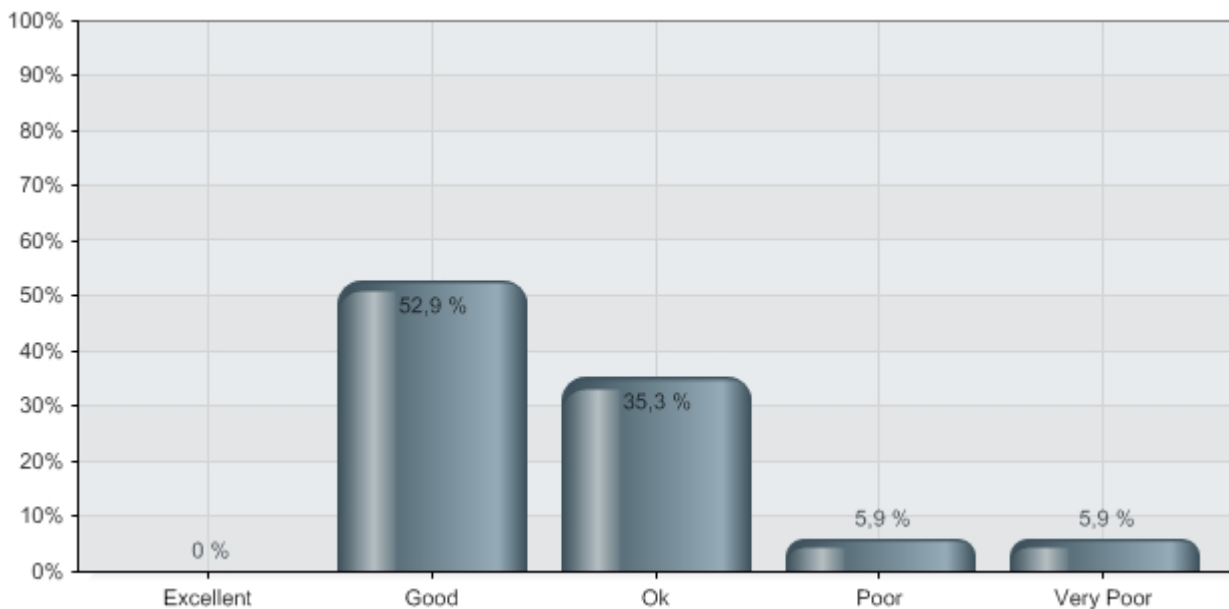
Table 10: Rating partnership performance on Communication



4.3 Leadership

The majority of respondents identified that leadership of the CRM partnership was good (52.9%). However, it is not clear whether the leadership being judged here is at the national or local level.

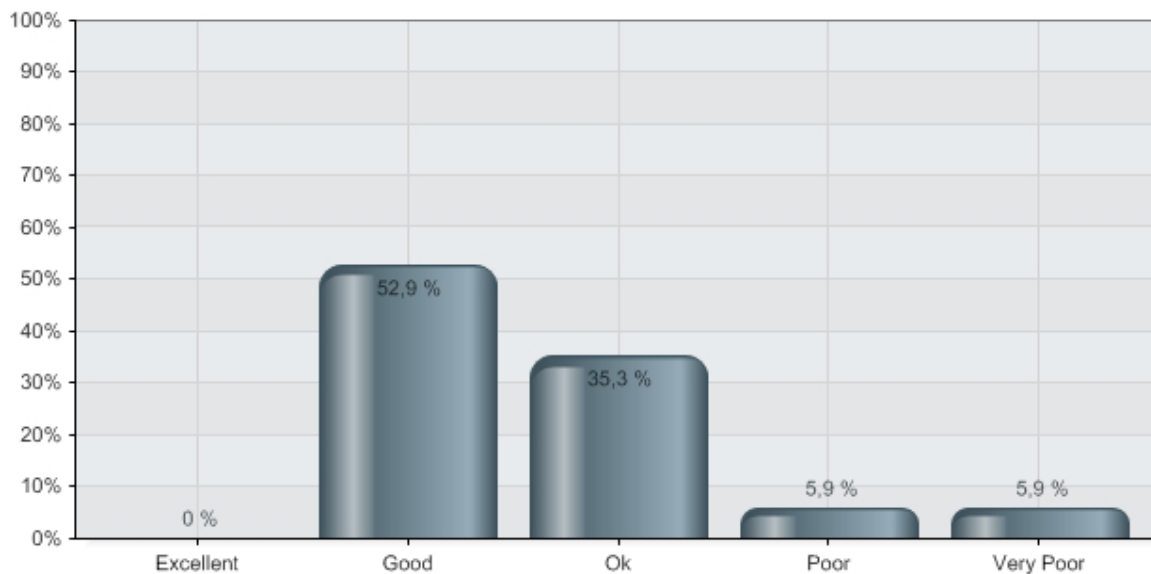
Table 11: Rating partnership performance on leadership



4.4 Implementation and Delivery

Over half of respondents (52.9%) felt that performance on implementation and delivery was good with just 11.8% stating that performance was poor or very poor.

Table 12: Rating partnership performance on implementation and delivery



5. Improvement Suggestions

Survey respondents were asked to identify suggestions about how to improve the performance of the partnership. A number of respondents mentioned the need to undertake activities to build trust in the partnership: examples included holding events and greater co-located working. On a related point, several respondents mentioned through the survey and interviews that partners needed to be encouraged to raise issues outwith the formal contract mechanisms and through the national co-ordinator informally in the first instance, which would be more likely the norm if a significant level of trust had been established between partners.

A couple of respondents highlighted the need to focus on key objectives of the partnership, for instance,

We need to establish some short - medium term targets which the partnership can focus on and measure delivery against.

One respondent also highlighted the need to set out an action plan in the next quarter or so, to clarify next steps for the partnership given the initial successes around procuring a software solution. They suggested that the partnership could focus more heavily on integration going forward, with the project board and the Improvement Service taking a coordinating role.

A couple of respondents also highlighted the need for absolute clarity on roles and responsibilities, linkages to other programmes (individual council programmes and other national programmes) and a timeline for development. There was a perception raised by a number of interviewees that national programmes were not always coordinated and confusion could arise when communication between different national programmes was poor.

In terms of specific suggestions, one respondent also highlighted that they would appreciate more support with project planning, acceptance testing and project management in general. One interviewee suggested the establishment of an implementation team, involving local authority representatives to act as an expert group, involved in problem solving at a local level and acting as an interface with Lagan.

The interviewee did acknowledge that the establishment of such a team would be difficult to resource, suggesting that the most appropriate way to resource might involve local authority representatives seconded to a national implementation team. This would clearly raise resource issues for local authorities and local authorities would need to see real benefits if they were to dedicate such a resource. Another suggestion was to clearly set out and agree a common approach to working together to achieve implementation across the partnership, including elements such as necessary governance procedures, and then request all members of the partnership sign up to this.

6. Conclusions and Next Steps

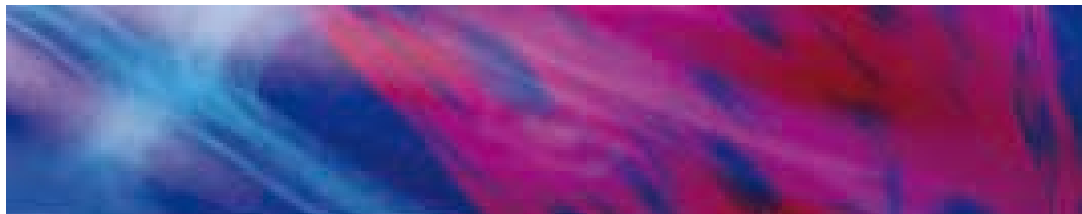
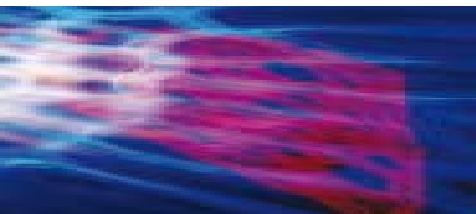
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- Define and agree how partnership members wish to work together
- Clarify and agree a medium to long term strategic vision, identifying what the partnership aims to do post-implementation
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- Identify a key decision maker within local authorities
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- Explore further supports for the CRM project, such as establishing an implementation team or providing specific project planning and management support
- Support greater coordination and communication between the various national programmes with links with the CRM project

This report will be shared with all members of the partnership and will form the basis of discussions about how to better work together going forward. The National CRM Board will identify specific areas for action.

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The Improvement Service is devoted to improving the efficiency, quality and accountability of public services in Scotland through learning and sharing information and experiences.