



MOUNT BARKER
DISTRICT COUNCIL

Continuous Improvement

Power BI Reporting

June 2018



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CRM - Problem Statement

- Council's Customer Service Charter, all staff to respond to customer service requests within 2 business days
- 2016/17 "Customer Request Management" (CRM) 51% not meeting this standard
- Backlog of CRM's with 875 requests remaining open and overdue.
- Performance indicators point towards Council failing to meet required customer service standards
- Impacts significant, public liability risks, statutory obligations, reduced customer satisfaction rates, damage to Council's reputation



Project Objective

- Map, Review and Improve CRM processes
- Improve avg. baseline service performance from 49% to 95%
- Improve Staff Accountability
- Project timeline approximately 16 – 20 weeks
- Use systematic Lean Six Sigma improvement methodology



Improvement Methodology

DMAIC - Lean Six Sigma methodology

- Define
 - Measure
 - Analyse
 - Improve/Implement
 - Control
-
- *Flexibility in project methodology allowed for a quick wins*
 - *One of the first of these projects completed within Council*



Project Schedule

Methodology	Proposed	Actual
• Define	07 July 2017	07 July 2017
• Measure	30 July 2017	30 Sept. 2017
• Analyse	07 Aug. 2017	Mid – Oct. 2017
• Improvement/ Implementation	30 Sept. 2017	Mid – Nov. 2017
• Control	30 Oct. 2017	30 – Nov.
• Project Completion	30 Nov. 2017	Mid – Dec. 2017

Achieving Objective

Root Cause analysis identifying the need to -

- Rationalise and lean up processes
- **Increase accountability**
- Introduce re-allocation stop points to ensure customers are kept in the loop
- Eliminating customer request stock piling under a single CRM

and

- Map and Document processes
- Provide interactive, real time reporting



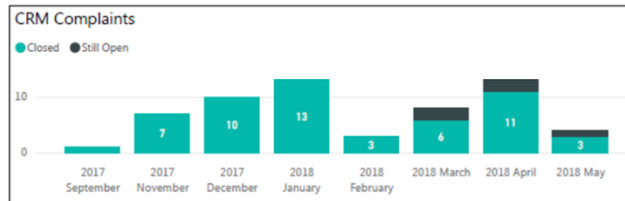
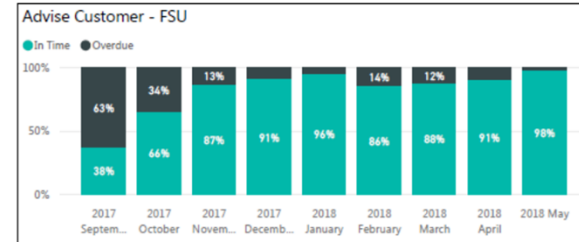
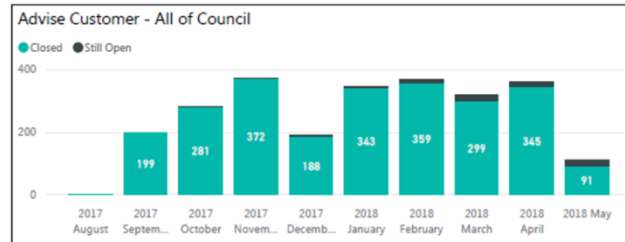
Achievements

The Objective reached -

- 90%+ Customers now notified within 48 hours
- 30%+ More CRMS being attended to
- Improvements to exceed anticipated 10% efficiency gains
- Reduced customer complaints and repeat CRM's
- 50% baseline performance level now reaching >95%
- \$150 000+ added value to rate payers per annum

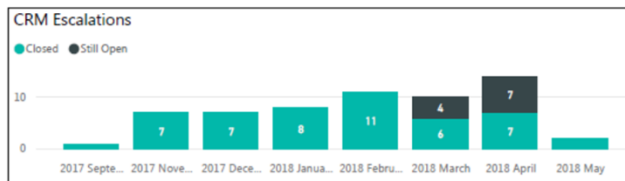


Measureable Performance



CRM Complaints Detail

open_closed	employee	crm_num	task_desc	open_date	crm_precis
Still Open	Dawkins Matthew	53827	CRM Complaint	Wednesday, 21 March 2018	Molens Ro
Still Open	FSU Works CRM Administrator	55296	CRM Complaint	Tuesday, 27 March 2018	1 Ware Clo
Still Open	Pearson Antony	60756	CRM Complaint	Tuesday, 10 April 2018	Counter cu
Still Open	Carter Glen	55094	CRM Complaint	Monday, 23 April 2018	101 Daddo
Still Open	Manarangi Karl	61198	CRM Complaint	Monday, 7 May 2018	Balhannah



CRM Escalations Detail

open_closed	employee	crm_num	task_desc	open_date	crm_precis
Still Open	Carter Glen	53972	CRM Escalation	Friday, 2 March 2018	Attn Field Services I li
Still Open	Hanchett John	60248	CRM Escalation	Thursday, 8 March 2018	Hutchinson Rd. Jane w
Still Open	Dawkins Matthew	56666	CRM Escalation	Thursday, 22 March 2018	Re-printed 9/2/2018. In
Still Open	Manarangi Karl	60690	CRM Escalation	Friday, 23 March 2018	Dear Mr Smith, Durin
Still Open	Carter Glen	57106	CRM Escalation	Tuesday, 3 April 2018	5 Sovereign Court Mt B
Still Open	Pearson Antony	60773	CRM Escalation	Wednesday, 4 April 2018	Ms Keilyn Hocking (041
Still Open	Carter Glen	60670	CRM Escalation	Wednesday, 11 April 2018	Distal 16/1/2018 5

- Intelligent Reporting – Increased Accountability
- Key to Management Buy In – Closes the Loop



Power BI

- Business analytics tools
- Delivers insights throughout the organisation
- Connects to hundreds of data sources
- Simplifies data preparation, and drives ad hoc analysis
- Produce and publish outstanding reports on the web and across mobile devices
- **Live Demo.....**

Questions

Thank you



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