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CASE STUDY

Kildare County Council

Case Management for the Modern Citizen

Transforming Case Management at Kildare County Council with Dynamics 365 and Power Platform

Responsible for the development and management of the natural resources of the county, Kildare County Council represents over 245,000 citizens across the municipal districts of Athy, Celbridge-Leixlip, Clane-Maynooth, Kildare-Newbridge and Naas. Committed to enhancing the day to day lives of the citizens it serves, the council and its 40 elected members strive to deliver a modern citizen experience through the provision of services spanning housing and community, roads and transportation, urban planning and development, amenity and culture, and the environment.

With citizen experience at the heart of Kildare County Council's strategic development program, the council sought to transform their existing case management process with the introduction of a future ready CRM system.

Drivers for Change

While their legacy system had served the organisation well in the past, failure to integrate with core systems was driving up the reliance on email and manual processes. Inbound cases were managed via a shared inbox, with each case manually processed and entered into the system upon receipt. This overreliance on manual data entry created a bottleneck in case processing, taking the team on average one and a half days to clear the inbox, with further manual data manipulation required to record case updates and resolution. To overcome this challenge, enhance security and provide a world-class citizen experience, Kildare County Council embarked on a digital transformation journey, one centred on the modernisation of their existing case management solution and service enhancement via the development of both Citizen and Member portals for the submission and management of cases and representations.

To leverage the council's 2019 investment in the Microsoft 365

solution stack and facilitate collaboration with other local authorities, Dynamics 365 – a solution used by the majority of local authorities in Ireland – was selected as the platform of choice. "The move to Microsoft Dynamics in partnership with Storm allowed Kildare County Council to leverage off the council's initial investment in M365, to provide a cloud hosted, integrated, IT secure and future proof solution to our citizens, members, and staff. We also benefited from seamless integration into other Microsoft online tools such as SharePoint, Outlook, Power BI, Bing Maps and Power Apps", commented Rory Hopkins, Head of Information Systems.

Despite the challenges presented by Covid-19 the two-step procurement process which began in March 2020, was concluded that August with Storm identified as the preferred vendor. Speaking on this decision Hopkins stated, "We are confident that the decision to work with Storm was the right one for our organisation. The relationship has since day one been a very professional one, from tender to technical delivery right through to support the team at Storm have been of the highest

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Rory Hopkins
Head of Information Systems
Kildare County Council

calibre. Change requests were handled in a collaborative manner throughout and we could rely on Storm to provide the appropriate staff at each individual stage of the project. Something that really stood out to us was the transition over to support post go-live. Sometimes the great rapport built with the project team can be lost when transitioning to support, however with Storm this was not the case at all with the support team demonstrating the same level of collaboration, professionalism, and commitment we had come to expect from the delivery team."

A Modern Case Management Solution

Following a series of business analysis workshops, the team set to work preparing code for the migration of all critical citizen and case data from the legacy CRM system, once the code was prepared the team then turned their attention to the configuration of the Dynamics 365 Customer Service platform fields and functionality.

Where the legacy system required manual entry of cases, the new system provided multiple streams for case creation including email to case creation and portal driven case creation. By leveraging the rich workflow capabilities and system integrations available within Dynamics 365 the new solution enabled Kildare County Council to reduce their dependence on manual email case logging and streamline how cases were triaged.

Automated workflows ensured citizens received confirmation of ticket submission. Smart system verification enabled the verification of new submissions against existing and open cases to prevent duplication. Keyword prioritisation further enhanced the overall speed of response ensuring more sensitive tickets could be dealt with quicker, with the escalation process baked in to support the organisations service level agreements.

To further streamline the case management process and enhance the service experience for both citizen's and councillors, dedicated portals were to be developed with Microsoft's low-code solution Power Platform to enhance and streamline the submission and management of both cases and representations. Leveraging Bing Maps integration and auto address capabilities, the Citizen Portal provides a quick and easy interface by which citizens can drop a pin to log cases quickly and easily. The Councillor Portal (still in pilot phase) on the other hand extends the capabilities of the Citizen Portal, providing councillors with a platform to not only log representations but also attain real time updates on their individual representations online via mobile or desktop.

Delivering Citizen and Service Excellence.

Dynamics 365 Customer Service and connected portals have transformed the day-to-day customer service operations at Kildare County Council, enabling the customer service department to drive better customer outcomes through process optimisation.

This has enabled the reallocation of resources to more value-add activities across the council including knowledge base management, complaints management and upskilling new staff. "Working with Storm to implement a new CRM solution using Microsoft Dynamics in 2021, has, simply put, enabled our

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Customer Services Officer & CRM Project Manager
Kildare County Council.

Customer Service team to do more, quicker and with less resources than we needed before. Using Dynamics, 85% of our customer cases are triaged and assigned to the relevant service on the same day received. This has enabled our team to also resolve 5X more cases at the first point of contact. Organisationally, despite our 2022 case load trending (as of September 2022) with a 13% increase compared to 2021, our median time to resolve customer cases has improved by 25% at present. Most of all, we have a solid platform from which Kildare County Council can use Dynamics to deliver citizen-centric service innovations in the coming years", explained Tony Shanahan, Customer Services Officer & CRM Project Manager.

The enhanced processing efficiencies delivered enabled Kildare County Council to improve its time to resolution metrics and positioned it to effectively tackle the increased influx of cases that arose during the Covid-19 pandemic.

"In 2021 Kildare County Council successfully partnered with Storm to implement the Microsoft Dynamics CRM system. This has provided Kildare County Council with a world class integrated digital platform which has resulted in an improved service for the Elected Members and the people of Kildare. We see this platform as a key piece of the digital infrastructure required to continue to support the provision of more on-line, integrated, and secure services for our citizens, members and staff "concluded Sonya Kavanagh, Chief Executive.

Interested in finding out how Storm Technology and Dynamics 365 Customer Service can transform customer experience and streamline case management within your organisation? [Click here](#) to speak to one of our Dynamics 365 solution specialists.

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