

# The Consumer Council for Northern Ireland champions the consumer with Sage CRM



The Consumer Council

## Customer

The Consumer Council for Northern Ireland

## Industry

Independent Organization

## Location

UK

## Solution

Sage CRM

The Consumer Council for Northern Ireland, based in Belfast, is an independent organization, working to bring about change to benefit consumers. Established in 1985, the Council is funded by the Department of Enterprise, Trade and Investment.

As part of the organization's wide-ranging work, a dedicated Consumer Support team provides a free, independent and confidential service to assist consumers with their complaints and enquiries in the statutory areas of energy, transport and water. Consumers can register their complaints by post, telephone and email or over the web.

## The challenge

For around eight years, the Consumer Council used a call-logging system, based on Microsoft Access, to record the receipt and closure of complaints

and enquiries. The system provided limited support for investigation and resolution. All the correspondence and documentation relating to a case, such as Microsoft Word letters of complaint, Microsoft Excel worksheets and emails, were stored outside this system, making it difficult to share information.

A restructuring at the Council in 2006 brought complaints handling out of the Council's different policy areas into a unified Consumer Support team. Every member of the team needed ready access to documentation, correspondence and information to handle a cross-section of complaints. Over the years the organization's remit was also extended, with more industries – for example, water and airlines – coming within its sphere.

'It's all about ensuring that consumers' complaints are handled efficiently and consistently behind the scenes'

Loretta Daly,  
Head of Consumer Support,  
The Consumer Council for Northern Ireland

## Challenge

The Consumer Council for Northern Ireland previously relied on a system that provided it with limited support and availability to share information across the business. For this reason, it required a solution that would automate key processes.

## Solution

Sage CRM gave every member of the Consumer Council instant access to documentation, correspondence and information required for handling complaints.

## Results

Having a complete view of the customer on the one screen has increased productivity and the time taken to record a complaint has reduced significantly.

‘Our new call-handling system will help us in harnessing and using the knowledge and intelligence we acquire and will support us in our work of championing the Northern Ireland consumer.’

Loretta Daly,  
Head of Consumer Support,  
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The ageing call-logging system struggled to cope with the increased pressure. Meanwhile staff’s time was increasingly spent manually tracking and recording complaints. Loretta Daly, Head of Consumer Support, comments, “We were aware of a number of significant issues and therefore developed a business case for replacing the system.”

#### The solution

In the closing months of 2010, the Consumer Council went out to tender for a new system to assist the work of the Consumer Support team. As a publicly funded body, the organization followed a strict tendering process. The Council compiled a detailed functional specification, clearly defining its mandatory and desirable requirements, in order to compare and judge bids fairly.

From a field of five strong contenders, the Consumer Council chose Surbiton-based Sage Business Partner Entegraty to provide a competitively priced solution based on Sage CRM. Entegraty committed to having the new ten-user system in place by the start of the new financial year.

The project began in earnest in late January, and it took nine weeks to complete. Entegraty is highly experienced in successfully delivering customer service solutions of a similar scope, and Loretta praises its effective project management: “Entegraty supported us very well and helped to keep us on track. They applied a very effective methodology that split the project into manageable ‘time boxes’, specifying the activities to be completed and the timescales involved. This meant that we were fully aware of what needed to be done at our end and of any dependencies that could impact delivery.”

Meanwhile, the Consumer Support team was also gearing up for the transition. Consumer Affairs Officer Mark Crawford said, “It’s true to say that we felt some trepidation at switching from reliance on paper files to a system holding all our data. However, the training workshops provided by Entegraty helped in bridging the gap.”

The project team included a typical user of the system, Investigating Officer Robert Dempster. His feedback was incorporated into the design of the solution. In turn, Robert’s involvement helped to keep the rest of the Consumer Support team up to speed on what was happening.

With Entegraty’s support, the system went live on April 1st 2011.

Mark says, “An Entegraty consultant spent the go-live day with us, helping each member of the team in turn with their job-specific tasks and queries. We then had Entegraty’s continued support once the system was up and running and they proved very responsive in coming back to us with answers and explanations.”

#### Business benefits

It is still early days but the advantages of using the new solution are already becoming apparent. There is a noticeable difference in the speed of handling complaints, as Mark observes: “We’ve reduced the time taken to record a complaint to just a few minutes. It used to be a bit of a chore entering a complaint on the system, but now it takes no time at all – everything is on one screen and it’s quick and easy to log every single detail, which the system prompts us to do so.”

Drop-down menus also help to ensure a complaint can be recorded quickly in the correct category and against the right company. Integrated postcode recognition software saves time and effort by accurately populating the address fields from the postcode, while integration with Microsoft Outlook allows emails to be sent directly from the system. Previously, staff would have had to create and store communications outside of the complaints system.

Mark says, “Investigating officers can now focus on managing the complaint. Again, whereas it used to take a full three days to respond to consumers, we can now get back to them much sooner.”

There has been a further significant benefit in increasing the visibility of the team's workloads. Dashboards now provide a graphical view of everyone's workload. This is shared by the whole team, so we can manage workloads and reassign cases, for example to cover absence. Investigating officers have ready access to all the information stored on a case by their colleagues, so they can quickly pick up a case and answer any queries from consumers.

Investigating officers also have a more powerful search facility, as Loretta explains, "In the past, we could search only by consumer name. The smallest human error, such as a missing apostrophe, could make it extremely difficult to track down a record. Now it's much easier to retrieve the history."

Summing up the benefits already achieved, Loretta says, "It's all about ensuring that consumers' complaints are handled efficiently and consistently behind the scenes and that we can store and share accurate, easily accessible information."

#### **The future**

The new system is now rapidly on the way to becoming an integral part of the Consumer Council's day-to-day work. As investigating officers have become more familiar with the system, they are looking forward to a follow-up training day with Entegraty to consolidate and extend their use of the system.

Looking ahead, Loretta says, "There are so many aspects where having comprehensive management information will enable us to monitor and measure our performance more closely, for example in analysing calls and the speed with which they are resolved. Our new call-handling system will help us in harnessing and using the knowledge and intelligence we acquire and will support us in our work of championing the Northern Ireland consumer."

#### **Solution overview**

- Easier, accurate recording of complaints from the consumer
- Manual processes eliminated to reduce administration and increase efficiency
- Time saved to focus on complaint resolution
- Improved management information through comprehensive reporting
- Expert project management, training and support from Sage Business Partner Entegraty

## About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at [www.sagecrm.com](http://www.sagecrm.com)

