

Overview

The Firmstep CRM is a tightly-focused CRM system developed specifically for Local Government. The Firmstep CRM is about providing customer access management across multi-channels. It is an affordable alternative to traditional expensive CRM systems that are often underused and present poor value for money for Local Authorities.

The Firmstep CRM allows you to capture customer details from multiple access channels, and create and track customer cases. The solution includes configurable scripting for customer service officers and can be integrated with queuing systems for your One-Stop-Shop.

Developed in response to requests for CRM capabilities without the huge overheads, the Firmstep CRM is available as a Firmstep for Government platform component. It can be used together with other parts of the platform or as part of your self-service portal and is licensed on a monthly subscription basis.

Business Benefits

The Firmstep CRM allows you to manage customer details, enquiries and service requests efficiently and simply, whichever access channel is used.

Your staff benefit from a simple, integrated system tailored to the way your organisation works and helps you to meet customer service targets. You can deliver great customer service by recording, tracking and processing enquiries quickly and transparently. The system can be used flexibly in line with how customers want to interact with your organisation.

No Duplicates and Powerful Search

The Firmstep CRM helps you maintain accurate customer records without duplicate information. Using the 'Omnisearch' tool you can search against any of the customer's information (e.g. address, name, date of birth) to find the correct details. This means you can easily find customers and match records easily where there are duplicates or incorrect information.

Omnisearch

The Omnisearch is a powerful component of the Firmstep CRM and the Firmstep for Government platform. The Omnisearch allows you to search across multiple data sources at once. You can configure these data sources filter these them as you search.

On the Cloud

The Firmstep CRM, a module on the Firmstep for Government platform, is a fully managed, hosted service within a Cloud Computing environment. There are no installation, upgrade or hardware costs and you can start using the solution straight away.

What is Cloud Computing?

Cloud Computing means that the software is hosted in a server 'cloud'; a large network of servers that provides load balancing, unlimited failovers and a utility approach to usage to ensure consistent performance and an extremely high level of reliability. The software can be accessed from anywhere with an internet connection.

With the cloud environment, you are always on the latest version of the software, can reduce your server and installation costs and use the latest updates to the software immediately. The Firmstep Platform includes a **Local Integration Module (LIM)** which addresses questions of data security and integrations with third party systems on the Cloud.

Local Government Specific

The Firmstep CRM has been developed in partnership with a number for Local Authorities in the UK. Many Authorities told us they only use a small percentage of the functionality of their existing CRMs, despite large initial investments and ongoing costs to maintain these systems.

The Firmstep CRM allows you to use only the elements of CRM relevant to your Authority in order to record, manage and track customer information and enquiries.

As a component of the Firmstep for Government platform, you can pay on a monthly subscription basis, avoiding a large initial investment. This Software as a Service (SaaS) payment model also means you can trial the software more easily and scale your platform activities quickly.

The Local Integration Module

The Local Integration Module (LIM) is a small, unique platform component which allows you to securely run integration actions such as database queries and web service lookups on your own servers, outside of the Cloud environment. The LIM sits on your servers, usually inside your LAN, and allows your integrations to run as normal when using the platform version of any of our products.

The LIM also allows you to store data inside your firewall which is useful where you have sensitive data or data security concerns about the Cloud.

Great Customer Service

Developed around the customer, enquiries can be recorded and passed on to the correct team whether the enquiry comes in via the phone, website, reception desk or directly from a One-Stop-Shop counter. The customer can remain anonymous if they wish until they reach a relevant customer service officer.

You can also make some elements of the Firmstep CRM customer-facing as part of your self-service portal for a more convenient, cheaper and transparent access channel.

100% Online

The system is entirely online so there is no re-keying of data, printing or paper costs.

The CRM can be integrated with queuing/ticketing solutions where printed tickets are required.

“Corby Borough Council has decided to adopt the new Firmstep CRM system because it will deliver a more affordable solution that truly represents value for money. The new system is built on the existing Firmstep platform, already widely used across the Authority, and will therefore be a known robust and reliable solution. This, together with the excellent product support provided by Firmstep, makes it the right decision for Corby.”

Simple and flexible

The system is fully configurable to suit the unique needs of your Authority and its business model.

The forms, processes, integrations and scripting of the CRM can be configured to suit you.

Proven Technology

The Firmstep CRM is built on our existing AchieveForms technology, as used by over 30% of Local Authorities in the UK. The solution also incorporates FAQs technology from AchieveInformation and scripting from AchieveDecision.

**Robert Hinde, Customer Services Manager,
Corby Borough Council**

How it works

Initial Enquiry In-person

Customers can make enquiries via the phone, reception desk or directly at a One-Stop-Shop counter.

The customer's name and the appropriate service area to deal with their enquiry are recorded and they are added to an electronic queue. If you have a ticketing system integration, a ticket can be printed at this point.

Customers can remain anonymous if they wish before they are transferred to a customer service officer. Receptionists can also record simple enquiries such as tourist information requests. These general enquiries can be used to build reports.

Calling tickets

Customer service officers have visibility of all customers waiting in the queue, how many and how long they have been waiting. Customer service officers can filter this to only display customers whose enquiries which match their area(s) of expertise. Officers can call or return tickets to be re-queued at the click of a button.

Dealing with enquiries

Using the Omniseach tool, customer service officers can find the customer's details by searching on almost any aspect of their information, for example, postcode, last name or telephone number. They can also add new customer details.

Once the customer has been identified, their details and service history are displayed on a single screen, including past enquiries and their progress.

Officers can create new cases, view or progress existing ones or update customer details.

Customer officers can use optional scripting to help them in dealing with enquiries, at any stage of the process.

About Firmstep

Established in 2001, Firmstep has experience working with over 30% of UK Local Authorities, developing front-end solutions with exceptional usability, functionality and integration capabilities. The CRM solution has been developed as a result of our long association and close relationships with Local Government organisations. The system is a true collaboration that delivers against real customer needs.

Scripting

Customer Services Officers can choose to use scripting to help at any stage of an enquiry. The scripting takes the Officer through a series of questions in a Decision Tree through to an outcome. This may be a link to a relevant form or further information.

Intelligent scripting means Officers can open up the scripting at whichever stage of the process they are on without having start from the beginning.