



Dynamics 365 helps City and County of Swansea Council Save 90% on License Costs and Improve Customer Experience

# City and County of Swansea Council

## Website:

<http://www.swansea.gov.uk>

## Number of Employees:

11,000

## Region:

Swansea, Wales

## Industry:

Local Regional Government

## Profile:

The City and County of Swansea Council (Welsh: Cyngor Dinas a Sir Abertawe) is the governing body for one of the Principal Areas of Wales covering Swansea, Gower and the surrounding area.

**City and County of Swansea**  
**Dinas a Sir Abertawe**



# Time for Change

In 2016 Swansea Council were exiting a ten year outsourcing contract with an external IT supplier. In line with the Government's desire to digitally transform public services, Swansea Council's IT department wished to take a fresh approach to IT projects, allowing technology to become a key business driver to improve the Council's services combined with cost savings.

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*"We started looking at different digital projects which we felt were key to transforming the Council, and a key one of these was around CRM and achieving a single view of the customer."*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

Due to the nature of outsourced contracts, it left a legacy of various departments within the Council having differing case management tools which did not integrate and were at different levels of usability, efficiency, and development lifecycle. It had become clear that to truly transform the council, they needed to **remove silos of information, ensure a consistent level of service in each department and ensure each department had a tool that empowered end users to do their job well.**

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*"A single view of the customer was vitally important to us, we wanted to drive efficiency by ensuring every department could securely access the data they needed about citizens in a way that felt natural and was as simple as possible for the customer"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

# Starting afresh

The Council ran an internal project to review their existing case management software, to identify which systems were the most cost effective and which were business critical. It was not efficient for the Council to continue with so many separate systems, unique by each department. The decision was made to focus on the Council's contact centre CRM system as a basis to build improvements from. It was a legacy system which was very difficult to update or change as it was not their own internally developed system.

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*"Putting the **customer at the heart of the council** was absolutely the number one priority, and the best place to start was naturally customer services. We knew if we could build a system that worked for every touchpoint in customer service, it would **ensure business process across the council were aligned to always give great service.**"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

The legacy contact centre solution was a very expensive system to run, licensed from another council, meaning there had been very little improvement made over its lifecycle. They decided the best thing to do was to build a new CRM solution from the ground up, to ensure the council would benefit from the most innovative technology available and have no issues trying to integrate with legacy systems.

# Planning for Change

The team at the Council knew that such an investment in an entirely new case management system would need to be a long term, effective solution that would work across the many diverse job roles across the organisation.

They listed the success factors for a new solution as the below:

- Flexible enough to offer multiple case management services, based on a single pool of customer data
- Secure enough to guarantee varying levels of access to different users
- Integration with document management and productivity tools in Office 365

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*"We agreed that we needed a tool that was flexible enough to function not only as our contact centre solution, but also our legal case management system, our taxi licensing solution, our waste management solution and whatever else we need. It had to be **flexible enough to serve multiple business cases** to ensure we got a real return on our investment."*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

This hugely narrowed down their list of potential systems, as many CRM systems are built bespoke to one purpose, and cannot be malleable enough to work for so many different users. They also knew that security was a huge priority, and ensuring that they had a system that was not only flexible enough to present data in multiple ways, but ensure that the data held was secure, and limited based on user roles, narrowed the list even further.

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*"We needed the benefits of a single case management solution, and the flexibility of many. We had to be able to securely set up many areas of the business with a solution that enabled them to access all the customer data they need and remove any chance of a breach"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

# Looking for a solution

Swansea Council looked into multiple suppliers that could offer a range of services, but decided that only Dynamics 365 could offer flexibility, security and productivity benefits. The case management project was run in tandem with improvements to document management and productivity, so the integration between Office 365 and Dynamics 365 made it a natural choice.

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# Selecting a Partner

Swansea Council went out to tender for the project on the Government procurement framework **G-Cloud**. risual's response came out on top for the Council's assessment factors including technical competency and price.

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*"We were going to take the business down an Office 365 route, so Dynamics 365 became more and more the natural choice. **It delivered everything we needed in terms of business case and was by far the most cost effective solution for us.**"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

# Designing the solution

The main reason that Swansea Council reached out to a Microsoft Partner for expertise on the project was because they wanted to benefit from deep experience and knowledge in a solution. Matthew Knott at Swansea was open about the challenges this represented, and what he wanted from a partner:

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*“We had worked with risual on a limited basis before, they had helped us with some Office 365 set up and some architecture sessions but this was the biggest project we had worked with them on by far”*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

Working collaboratively with the risual CRM consultants, a full picture of the vision for the project and the high level requirements was built, providing Swansea a series of recommendations on what can add value, and what can be achieved within the constraints.

Following the initial workshops this split the overall project into three distinct phases:

- Taxi Licencing – there were about 20 different types of forms used by the contact centre team for managing driver, vehicle and operator applications.
- Planning and Licencing Applications – managing all planning applications received as well as premises, people, event and all other licencing applications.
- Other Applications – managing the remaining applications accepted by the contact centre team.

There was also a requirement to integrate the Dynamics 365 environment into the NLPG Gazeteer database to ensure that all supplied postcodes for citizens and organizations could be validated.

Throughout the project the main aims were to consolidate the multiple different forms into as few as possible and to ensure that the completion of said forms were as efficient, logical and intuitive as possible.

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*“risual were very good at taking our illustration of where we wanted to get to, refine it down and improve those ideas to an ideal version of that original vision in a way that’s streamlined and efficient”*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

Swansea Council had a very distinct set of requirements that they wanted to achieve, but the value of working with risual was that the business and technical consultants could expand those requirements to deliver a great deal of added benefit and functionality on top of the original requirements. It is only by developing a relationship as a trusted advisor, with a deep understanding of an organisation's needs, can an organisation really benefit from the broad functionality of Dynamics 365.

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*"Sometimes it was a case of coming back from what we focused on, and risual showing us how the solution might not work in the exact way we expect, but can be set up to achieve our needs when we work together with the overall requirements in mind"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

# Implementing the Solution

Dynamics 365 implementations can be a very challenging IT project, as it changes internal business processes and affects multiple departments, not all of whom are technically minded. The success of a Dynamics 365 project hinges on the enthusiasm and appetite for change from end users in every department the solution touches, and managing expectations, working to tight timeframes is part and parcel of the project delivery.

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*“Once risual opened our eyes to a lot of what this solution could potentially do, we had people either getting very excited and wanting too much too soon, or people panicking that it was going to turn everything upside down. risual were very good at handling both of these situations and had the depth of resources available to work in a very agile way to ensure any changes or internal challenges were dealt with quickly. Whether it was a **CRM consultant to come and understand business requirements, or some bespoke development**, we were seeing a real commitment from risual to make to project work for us”*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

The core scope of the project was to ensure the customer service case management, so the priority was to ensure this was delivered within the project budget and timeframe. Managing expectations was key and risual had a project manager assigned and committed to the project to ensure adequate resource was available to deliver this on time.

It was also requested that at the end of the project, total ownership of the contact centre solution was to be retained by the council so risual worked with the council to ensure that the final solution was, as much as possible, a “no code” approach that could ensure the council could continue to evolve the solution internally as their business evolved, with as few restrictions as possible.

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*“Working with risual, we did have a lot of resistance as there was going to be a lot of changes. risual did always provide a solution that took feedback on board, and on the go live date we had a system that everyone was competent and happy to use”*

**Delyth Evans,**  
Customer Services Operations Manager, City and County of Swansea Council

# Benefits

Swansea Council is now using Dynamics 365 and has seen significant benefits in terms of cost savings and improved service to customers. They can now **accurately identify a customer and their interactions with the council, regardless of which department they need**. This has had a huge effect on customer satisfaction and is helping them to deliver an even better customer service by being more proactive.

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*"The team now have been able to reduce the serving times significantly, and were seeing a lot less customers being forced to wait."*

**Delyth Evans,**  
Customer Services Operations Manager, City and County of Swansea Council

Swansea Council could report a 90% reduction in their annual license costs after moving to Dynamics 365, thanks to the savings of integrating with Office 365, and reducing multiple Case Management Systems down into one. Combined with an improved customer experience and empowered staff, this project has been a resounding success for Swansea and one that will continue to benefit them for years to come.

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*"In terms of costs, we're looking at something that's 90% cheaper in terms of annual license costs that what we were paying"*

**Matthew Knott,**  
Software Solutions Architect, City and County of Swansea Council

In addition to customer experience improvements, Swansea Council now enjoy much more streamlined contact centres which is built bespoke to their users requirements, which means not only can they identify a customer easily, they can quickly resolve their issues.

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*"We've streamlined a lot of the processes and way we work, the new tool is helping the customer service agents work more efficiently and easily"*

**Delyth Evans,**  
Customer Services Operations Manager, City and County of Swansea Council

Thanks to Dynamics 365, Swansea Council are now truly putting the customer at the heart of their operations by enabling better service through data driven interactions. It is still early days for the solution, and there is a great deal of scope to grow the services to improve other services for the council in the long term.



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