

CRM stands for Customer Request Management.

This is a system that is designed to help Council manage and streamline customer inquiries, service requests, and customer interactions.

It encompasses all activities from the moment a customer reaches out with a query or problem, to the final resolution and follow-up. The goal is to ensure a smooth, efficient, and satisfactory experience for our customer.

Why is it important

Improved Customer Satisfaction: By managing requests effectively and resolving issues quickly, we can enhance our reputation and build trust with customers, resulting in higher satisfaction levels.

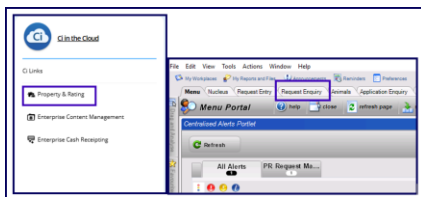
Increased Efficiency: CRM streamlines the process of handling requests, reducing the chances of errors, lost requests, or delays. It helps us track customer interactions and resolve them in a timely manner.

Better Communication: It enables a central point for customer communication, ensuring that responses are consistent, accurate, and personalized.

Data-Driven Insights: CRM systems can collect valuable data on customer interactions and request trends, helping us identify recurring issues, areas for improvement, and opportunities

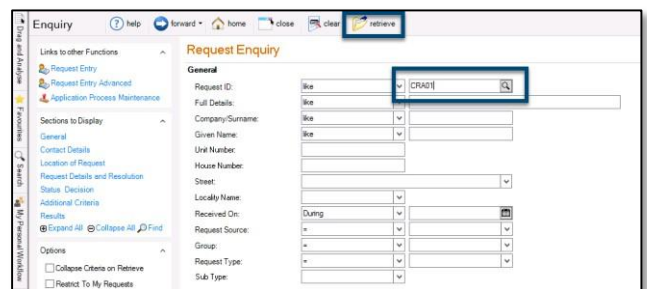
How to locate all your CRM's awaiting action:

Navigate to [Cj](#), Property & Rating then **request enquiry** tab



LOCATE CURRENT CRM USING CRM NUMBER

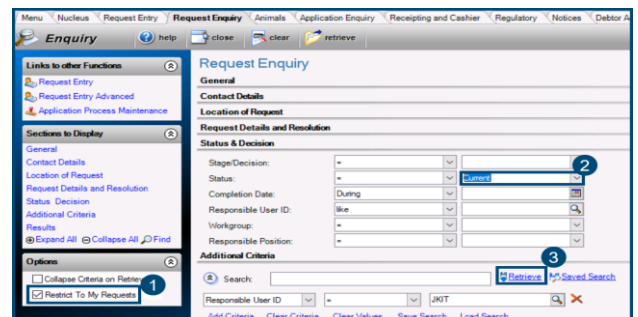
1. Paste CRM number from notification email into the request enquiry ID box.
2. Click retrieve to bring up the record. Clicking on the resulting record will open the full details including who is involved, what the situation is and what is required.



LOCATE CURRENT CRM WITHOUT CRM NUMBER

Staying within request enquiry screen

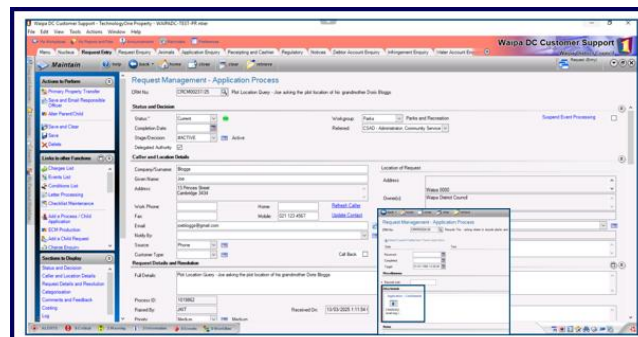
1. Tick "restrict to my requests"
2. Change status to current
3. Click retrieve to populate all current CRMs awaiting action



It's important to update the CRM when you action the customer's request. It shows transparency when other staff access information on how the CRM has been actioned, which may be required at a later date when responding to a customer.

VIEW & ASSESS CRM

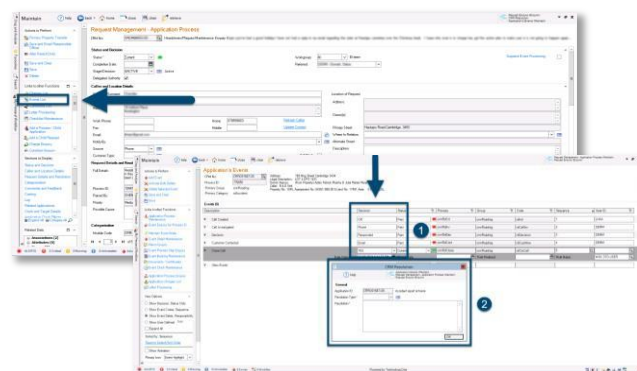
1. Locate CRM using previous instructions.
2. Check full details box for the customer's request.
3. Scroll down Ci attachment grid to view any attached communication/information.



ACTION & CLOSE CRM

If you receive a CRM that can be completed straight away, act upon the request then click on the *Events List* menu on the left hand side of the page to close.

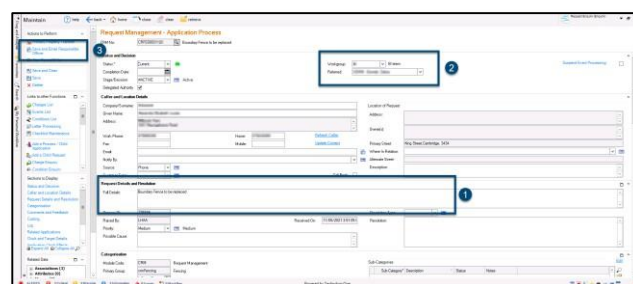
1. Answer each question – choosing response from decision box.
2. Update populated resolution box



REASSIGN CRM

If you receive a CRM that is not meant for you, it's important to reassign the request back to the person who assigned it to you as soon as possible.

1. Add a note in the *Details box* with the date and your username stating that the request is being reassigned and reason why.
2. Update the workgroup and referred to boxes at the top of the page with the correct details, Click on *Save & Email Responsible Owner*. Do not close the CRM.



ONGOING REQUEST

If you have a request that is going to take longer to resolve, firstly change the *Resolution Type* to the appropriate *In Progress* status and add a note in the *Resolution box* to inform on progress.

When you are ready to complete the request, follow the steps above to complete and close.

