

## Improving operational efficiency with a Salesforce® cloud-based CRM implementation

### Challenge

**Ofcom is the UK Communications regulator. It regulates the TV and radio sectors, fixed line telecoms, mobiles, postal services, plus the airwaves over which wireless devices operate.**

Ofcom was operating from a legacy on-premise CRM system which had supported a number of Ofcom's business processes, including external broadcast complaints (directly and through a contact service team), licensing teams, enforcement teams and the analysis and reporting team. But the total cost of operation of this system was significant and didn't offer value for money. Ofcom's then Director of ICT, David Doherty, knew the legacy system was no

longer suitable for the needs of the organisation and was impeding its mode of operation and growth.

Ofcom wanted a single interface for consumers, citizens and stakeholders no matter what they wanted to do. Various departments within Ofcom needed access to an increasingly wide range of data to process a complaint case or an application for a licence.



Ofcom looked at cloud-based models to eliminate IT infrastructure and have some control over subscription and support costs.

After some research on G-Cloud and a business-based selection process, Ofcom settled on Salesforce.com Service Cloud as the main platform to re-organise its business. Ofcom looked for a deployment partner that understood its needs and had successful experience in implementing Salesforce.com systems and solutions.

Methods was tasked with articulating what the CRM replacement ought to look like and delivering an extensible, robust and flexible solution that would allow Ofcom's departments to operate more efficiently over the years to come.

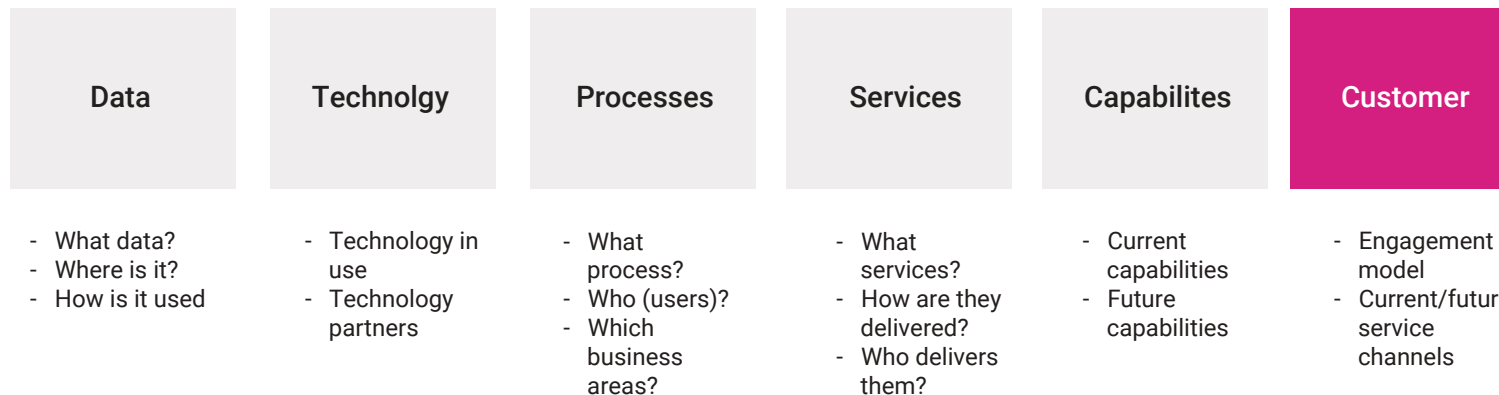
## The solution

Methods started off by running a Discovery project to establish the right strategy for Ofcom.

Methods' digital transformation team spent time with the Ofcom management and senior stakeholders to fully understand the key challenges they experienced, such as the difficulties in recording and sharing data, in transforming their customer service model because of legacy business processes and applications, and their aspiration to move operational teams out of the London office.

The 8-week discovery phase allowed Methods and Ofcom to fully understand the different "layers" within the organisation and how they hang together – including customers, employees, business capabilities, services, processes, technology capabilities all the way through to data.

The research was carried out through workshops, one-to-one interviews, site visits to the external call centre as well as side-by-side sessions with internal teams.



**40**

workshops across 3 main  
service areas

**50+**

business & technical  
representatives consulted

**1,000+**

user stories created

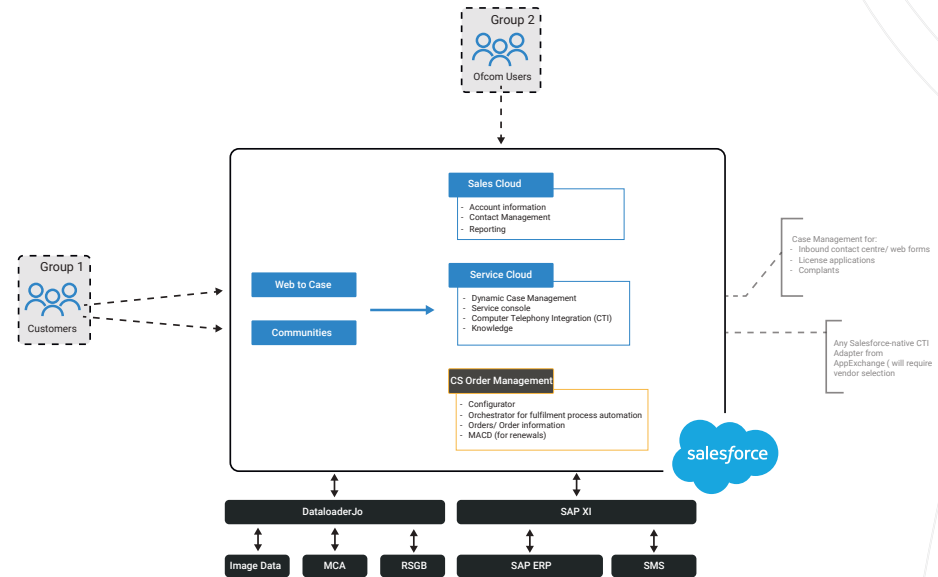
Methods uses agile methodologies, but to suit Ofcom's needs, a more blended approach was implemented, coupling key agile components with elements of more traditional delivery methods, such as the introduction of project board meetings and documentation.

With the 'as is' value chain and business landscape mapped out, Methods proposed to replace the on-premise system with an implementation of the Salesforce platform – which comes with a vibrant ecosystem of add-on solutions so clients can bend the solution in any way they like.



# Salesforce Platform implementation

- Salesforce Sales Cloud as the main CRM system to get a single shared view of the customer and a single source of data for reporting.
- Salesforce Service Cloud for self-service and call centre purposes to improve customer experience and reduce overhead on the call centre staff.
- Salesforce Communities to enable an easier and better web contact experience for clients.
- The CloudSense Commerce Platform for enabling broadcasters to pay, renew and configure their licences online.
- Conga composer for document automation enabling automatic licence creation. The solution also needed to be integrated with the wider architecture including SAP integration and configured with 14 other key line of business applications and databases.



With the solution widely accepted, Methods was then asked to deliver the project – which was accomplished in just 10 months.

Delivery saw the continuation of the blended agile/traditional approach: the delivery team mixed prioritisation of the Product Backlog, Sprint Planning, Show & Tells with feedback and regular progress reviews and adjustments to ensure work was aligned with business needs.

This blended methodology allowed Ofcom to manage risks whilst leading this significant business transformation programme successfully.

## The results

Using the Salesforce platform meant that a prototype could be built in weeks and development could start within a month of the start of the delivery phase.

Moving to a modern, cloud-based CRM system has allowed Ofcom to move operational teams out of the London office with the assurance that CRM data and service capabilities could be accessed and updated from any location on both desktop and mobile devices.

Cases can now be raised, closed and shared with different service teams quickly and easily with all the relevant information being available on a single CRM record for anybody who needs it.

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This really makes the lives of our staff much easier. This single view of our customers means we can operate much more efficiently than before. It also means we can offer an improved customer experience because we can answer queries much faster.

- David Doherty

Capturing data from third-party organisations, such as mobile phone service providers, is now standardised through the use of Salesforce Communities Cloud and means data is available in a single platform for analytical and reporting purposes – all whilst being easily exportable and sharable with both stakeholders and other line of business applications.



## Benefits

The scalability of the Salesforce platform and its rich ecosystem means **Ofcom can scale its CRM solution and extend functionality** as and when needed. This could range from introducing new service channels, such as web chat, to being able to quickly add new fields for data capture by the call centre or licensing teams.

**Licence applications and renewals will become simpler and quicker** with the introduction of a new self-service channel and Salesforce Communities Cloud – reducing the reliance on internal service teams to take an action where it is not absolutely necessary and therefore improving operational efficiency.



In time, the Salesforce platform will also mitigate the current integration challenges faced by Ofcom. As the Salesforce platform provides simple, powerful and secure APIs, Ofcom will be able to link with its other operational applications and databases more easily than before and increase the speed at which data can be accessed.

Data security, also of paramount importance, is managed through end-to-end encryption along with storage in a UK data centre, with a back-up to a European data centre.

Last but not least, this major transformation programme is expected to generate significant savings over the coming years.

# methods III



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