

CRM at Statistics Finland – platform for stakeholder data and relationship management

Susanne Hellman-Ketola (Statistics Finland)

susanne.hellman-ketola@stat.fi

1. Introduction

“Customer first” is one of Statistics Finland’s strategic goals. In order to put the customers first we have to know our customers and anticipate their needs when it comes to statistics. The aim is to improve customer experience at all touchpoints of the customer’s journey.

Our customers use multiple channels and interact with Statistics Finland in several ways and roles. To keep up with and manage all this customer data compiling from different channels of communication (personal contacts, email, telephone, website, live chat, social media, events/webinars etc.) Statistics Finland decided to invest in a modern CRM software (Microsoft Dynamics) and gradually grow it to manage the full scope of stakeholder processes at Statistics Finland.

VISION FACING THE FUTURE WITH KNOWLEDGE – RELIABLE STATISTICS FOR THE BENEFIT OF CUSTOMERS



1. Strategic goals of Statistics Finland 2016-2019

2. Background

Customer/Stakeholder data was not gathered and managed in a coherent way and easy access to it was not available. Operative functions of chargeable services, planning of operations and finance as well as monitoring and follow-up demanded much manual work.

The CRM software used was outdated (15 years old) and integration possibilities were scarce. Some organisational units had developed their own software and customer data was scattered. A correct overview of customer interactions with Statistics Finland was hence difficult to obtain.

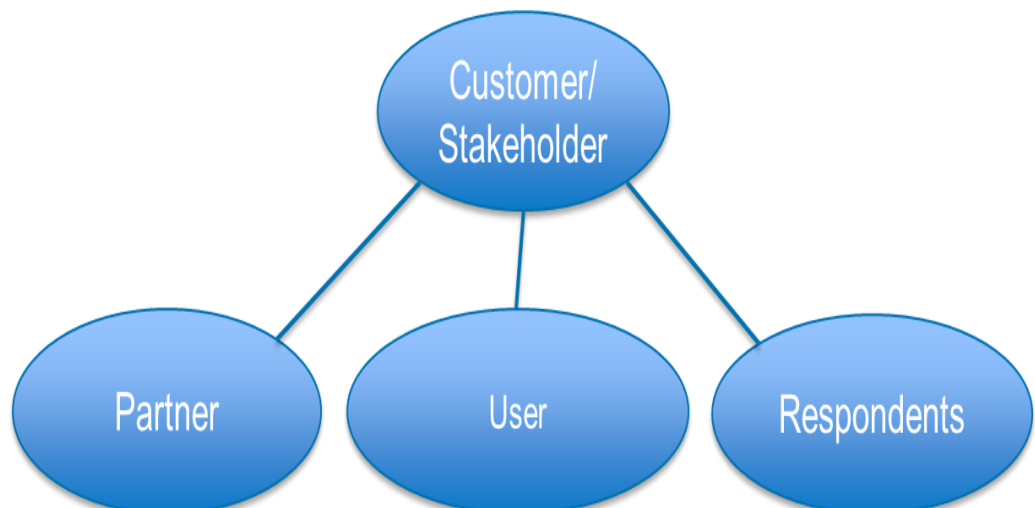
3. Need for 360° view of customer interactions

Our customers interact with us in different ways and roles. We need to identify those roles and touchpoints in order to be able to enhance customer experience and develop smooth customer journeys. This work is currently ongoing and especially used for re-development of the website. The following figures are drafts of this development work.

Customer Concept

Customers are defined as following:

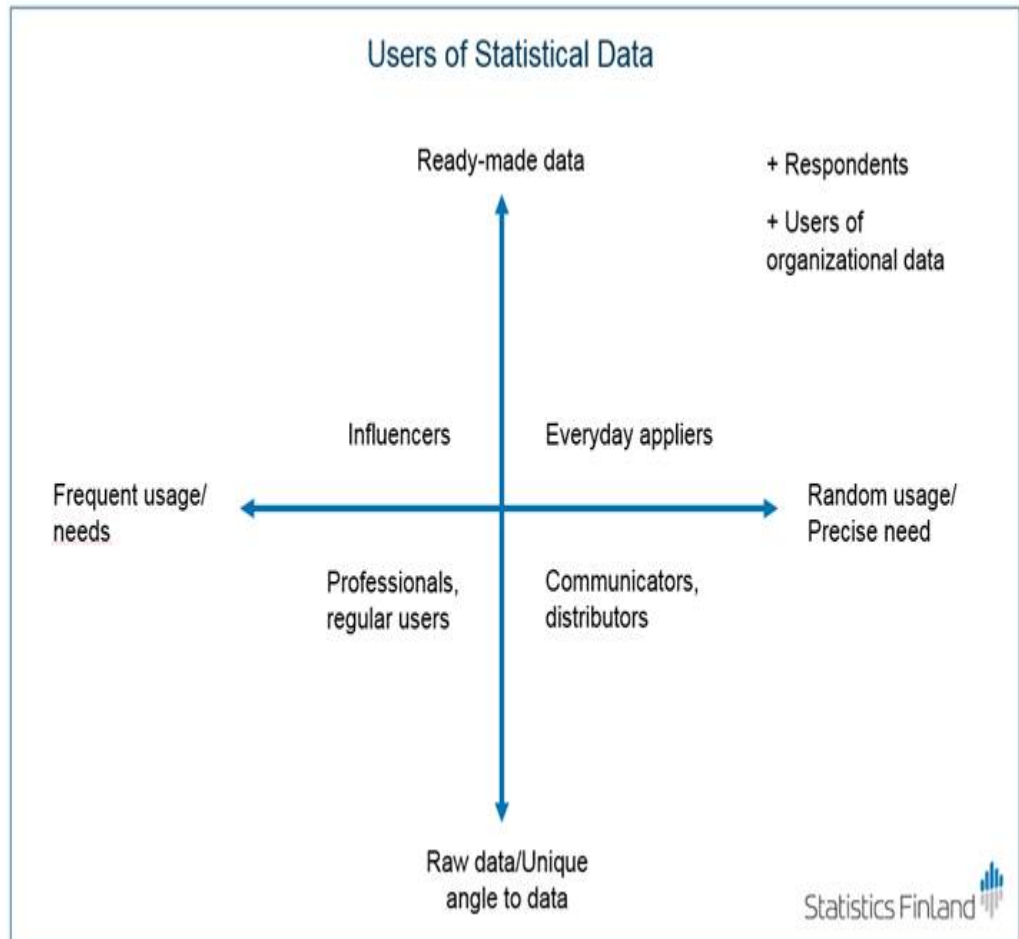
“Customers are those who benefit from Statistics Finland’s output regardless of the output being chargeable or budget-funded. Respondents are also customers.”



2. Concept of Customer/Stakeholder (draft)

User personas

Since 2016 there is a large-scaled development project for reforming Statistics Finland's website. In this connection much focus has been on identifying website user personas. Again, the following figure is just a draft of this development work.

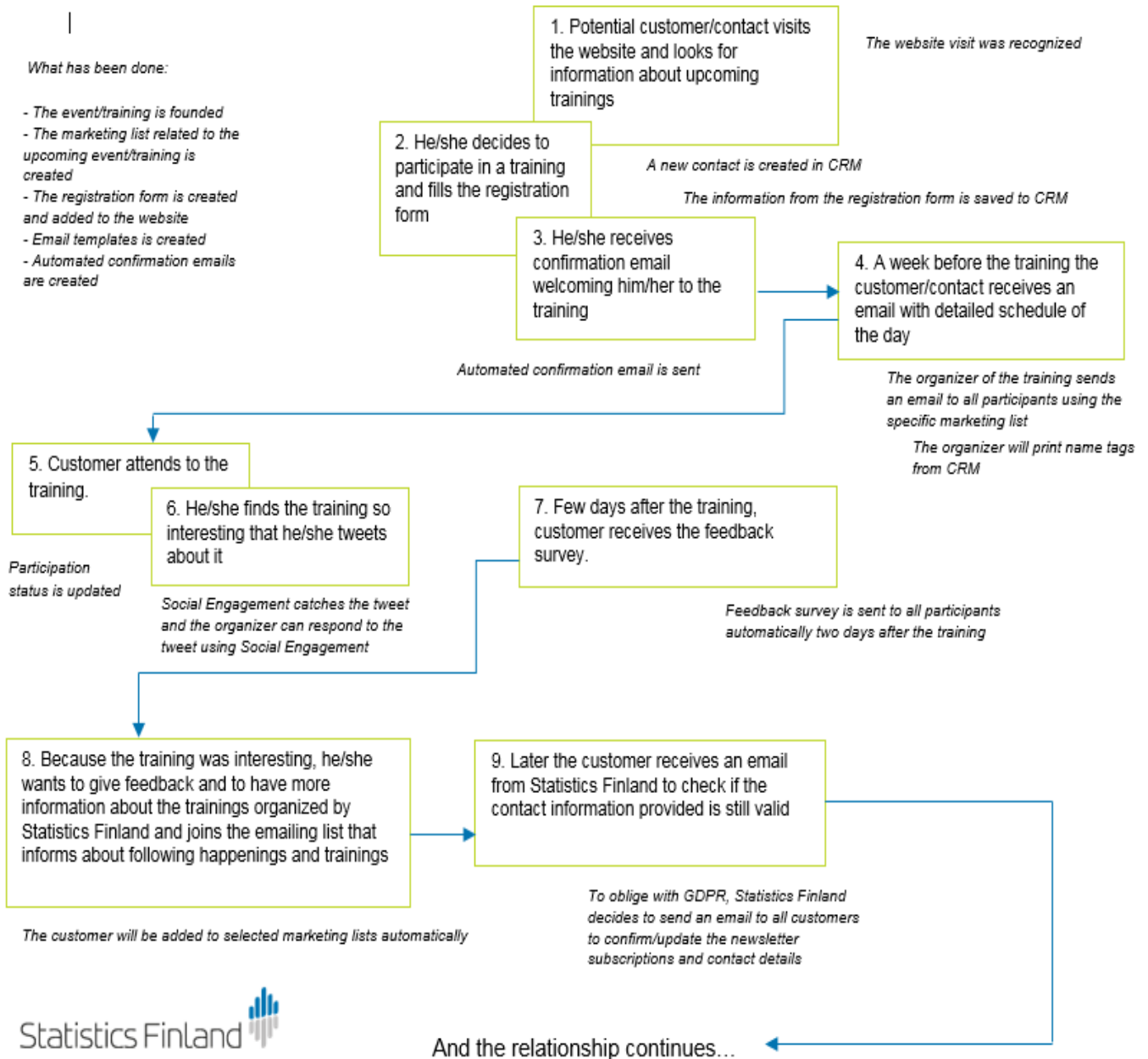


3. User personas of statistical data on www.stat.fi (draft)

Customer journeys

Understanding customer journeys are an important factor in improving customer experience. Descriptions of journeys have been made and beneath is an example of how a customer journey generates interactions and triggers both automated and manual actions integrated in CRM.

Customer's journey - example



Monitoring customer needs

Different surveys are also used for monitoring customer needs. Lately Statistics Finland tested a new method for gathering 360 degree views on its operations. In fall 2016 a web brainstorm was organized for customers/stakeholders. We were interested in their views on significance of statistics in their own work, in society as a whole and what kind of changes they anticipated (in the importance of statistics) in the future.

Next a similar web brainstorm was carried out for the employees of Statistics Finland. The employees were asked about how they felt that things have changed since 2012 (during current Director General), how they would increase speed and generate new data sources.

Later management were able to give their views and rank action proposals according to their importance. The same web brainstorming –method was used.

4. Content and functions of Statistics Finland´s CRM

The following processes as well as customer data are integrated in the CRM entity as for now.

Customer contacts (both organisations and contact persons)

Data is compiled from different customer interactions. Most comprehensive customer data is obtained from our chargeable operations since the customer is always identified.

- customer id
- name of organization
- VAT-id
- phonenumbers
- www-address
- postal address
- invoicing information
- operational information such as.:
 - industry/branch
 - amount of personnel
 - turnover
- internal segmentation of Statistics Finland:
 - user segment
- For contact persons also:
 - title
 - occupation (code)
 - language
 - permission for marketing/marketing ban
 - language
 - etc

Special compilation, standard product and invoicing processes

Processes and operational workflows of chargeable services have been implemented in the CRM system. The processes extends all the way from leads to and invoicing. All offers, agreements and deliveries are also being executed within the system. Integrations with third party cooperators are being used in for example invoicing and accounting.

Process for licences to use statistical data

The licensing process (for using special data sets) is integrated in the CRM system. Through workflows we are having better control of the whole process as well as picking up speed and trying to shorten the handling time.

Targeted communication, marketing campaigns, social media

The software tools used are ClickDimensions and Social Engagement, which are integrated within Dynamics. They enable for example communication/marketing automation and campaign management. With Social Engagement you can for example set up searches to listen to social media conversations, link posts to CRM and manage social profiles.

Feedback process

The software tools used are ClickDimensions, Webropol and Voice of Customer (part of MS Dynamics). When a customer completes a survey, you can use rules to trigger follow-up actions that occur immediately. For example, if a customer replies with a complaint, the system can create a new service case and route it to the right person for prompt handling. You can also send a survey automatically after a delivery, to track how satisfied your customer is with the service they received. The feedback is automatically stored in the CRM system and you can see your customer's feedback history and make use of it in future interactions.

Event process

The event process is fully integrated in the CRM system. All events, seminars, fairs, customer training and webinars are being managed through the system and a lot of manual processes are now automated.

Reporting

CRM-data can be obtained through ready-made reports and dashboards but most importantly also using Statistic Finland's reporting portal so there is no need to be a licensed Dynamics-user just for reporting purposes.

5. Future development areas

There is still room for development with our stakeholder processes, such as NSS and other cooperational bodies. Developing the website also contains possibilities for improved self-service and personalization as well as handling the digital touchpoints of customer journeys and further identifying of user personas. To comply with data protection and the new GDPR in 2018 is very important. Since social media is becoming more and more important channel-wise also the monitoring needs more tools and resources.

6. Conclusion

“Customer first” challenges National Statistical Offices but more importantly, increases the impact of statistics. The rate of change is growing. Our customers use multiple channels in their

interaction and interact with us in different roles. They expect us to offer individual services based on their needs and to ensure great customer experience at all touchpoints of the customer's journey. A CRM system is a good tool for managing the abundance of customer data compiling from different channels of communication and using it to create a 360 degrees overall view of customer interactions.