

Customer Relationship Management: application for parliamentary information services

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Abstract:

Parliamentary information services are concerned about being a source of information to both Members of Parliament and the society. Members of Parliament because they are decision makers who face the challenge of meeting society's demands in a changing environment and citizens because they are the center of the legislative process.

However, working with these two dimensions of clientele can be challenging. If the work processes are not well established, there will be problems affecting the efficiency of the tasks. In terms of products and services offered to Members of Parliament, much has already been done. Therefore, longing to be closer to citizens, respond to their information inquiries and listen to their requests, Parliaments have been designing multiple channels of communication. This effort can become unsuccessful and create barriers to the accomplishment of a good communication between the Parliament and the society. In addition, can be time consuming, affecting the whole system of information provision to Members of Parliament.

Aware of this challenge and already facing difficulties with multiple communication channels, different technological structures, and staff, the Brazilian Chamber of Deputies defined a project plan to determine a corporate governance model for the relationship with the internal and external public. The main purpose of the project was to define and implement an integrated management system to deal with the requests. Moreover, develop policies to respond to these demands in a constant movement of collaboration among the administrative areas responsible for the management of communication channels. As a result, it was expected that the relationship management model achieved high level of excellence in responding requests by: defining competencies in attending demands, eliminating redundancies, keeping integrated files with information about individuals, and offering personalized support. From the citizens' point of view, contribute to their education and perception of the parliament, promote their participation in debates within the parliament, and promote citizenship. Due to the expertise in dealing with inquiries, the Center for Information and Documentation (Cedi) was elected to manage the project. This paper aims to describe how the project was conducted, present the results and show how they have changed and improved the processes of making information accessible for Members of Parliament and the society.

Keywords: Parliamentary Libraries, Information Provision, Information Services, Customer Relationship Management (CRM).

1- Introduction

Libraries and research services are vital structures that support parliaments in achieving their daily tasks. They can be present at all stages of the legislative process, either responding information requests directly to the members of parliament and their advisory staff or indirectly by supplying citizens with information that will eventually engage them in the arena of policymaking.

Members of parliament depend on timely and reliable information to support their parliamentary duties and representational role. Therefore, libraries and research services need not only to possess resources, research tools, and an excellent team, but also organized processes and procedures to achieve such a challenge. It is necessary to manage requests adjusting transactions to individual needs, provide accurate and relevant information, and pursue feedback for improvement.

On the other side, citizens also have requests, but they look for a different kind of information. They seek for data that will enable them to make decisions in different aspects of their lives. One may need information on certain legislation to decide about retirement, health or economic issues, for example. In addition, they might want to be informed of how the parliament works and what bills are being discussed, that is to say, they need educational information. Educated citizens can play a significant role on the development of the country. For this reason, parliaments need to offer suitable services, supplied either by libraries or some other kind of information services to provide legislative information. Dealing with these two dimensions of information delivery is a challenge that depends on organized processes, established policies and priorities, and adequate resources.

Processes are usually defined as a series of actions or steps taken to accomplish some work. In order to carry out the activities involved in a process, some resources are necessary – people, technology, finances etc. It is also needed to define responsibilities, standards, and values that determine if the process has succeeded or reached its goal. In order to have work processes organized it is necessary to align employees' procedures, determine best practices, create manuals, develop products, integrate systems, and promote a range of benefits that empower the institutions to fulfill their tasks efficiently. It is usual, however, to identify services within institutions that haven't yet gone through any kind of process mapping. One can be able to identify or feel that certain activity needs to be changed, or that the connectivity with other stages of the process needs adjustment, but it is not able to create an opportunity for effective change. This way, organized process can be critical for the success of a service.

In parliaments, managing the interaction between information services, internal and external clients may not represent a simple process. Taking into consideration that services can be offered through different channels, it can be even more complex to set workflows that embrace and coordinate all interactions. Some parliaments may opt to separate completely these two dimensions of exchanges what can facilitate the workflow. In both cases, information delivery services with different levels of complexity should pursue the

improvement of processes by mapping and remodeling them according to clear objectives. By adopting this pattern of work, parliaments can increase effectiveness in delivering information timely. Additionally, they can take advantage of the benefits of such action such as automation, elimination of useless steps, construction of a knowledge base, and segmentation of clients.

Identifying groups of clients and setting priorities and policies for the transference of information is also of great importance to determine which interactions are going to be treated firstly. Moreover, clients have a variety of interests and need superficial or in depth information, depending on the position held. As government institutions, Parliaments are also affected by fluctuations in the ruling system in power which can change policies related to customers' priorities. Likewise, other government departments and staff have to be considered with a certain level of priority, due to the relations established among them and the Parliament. However, the information services may still have to deal with the general public requests, creating some tension mainly if the country has specific laws regarding information access and time limits for responses. Therefore, settled priority policies are of crucial influence to the management of requests.

Staff, finances, physical and electronic collections, and a good relationship with other government departments are the resources necessary to accomplish the duty of responding to requests properly. The size of collections and the quantity of staff will, of course, vary, depending on the size of the service. Among the resources, the staff is considered the most important because they are the ones who interact with the customers. They connect with the customers on an individual basis and most times promote long-lasting relationships. Without this valuable resource, processes, collections, and policies do not worth much. It is true that electronic collections can serve clients on an independent basis, but for the complex requests the information service cannot do without a trained staff. Hence, organized processes, priorities and policies, and resources are the key elements that make an information service succeed.

Aware of the value of these facets, the Brazilian Chamber of Deputies has always endeavor to recruit professionals and invested money in the development and acquisition of collections. Nonetheless, it had not yet invested efforts in the definition of priorities, policies, and organized processes in the work of delivering information. As a consequence, in 2010, a corporate project for the definition of a governance operating model for the relationship with the internal and external public was constituted. In addition, the project aimed to institute an integrated management system for the information delivery process, taking into account the multiple channels for contact with the public that were offered by the Chamber.

This paper intends to describe how this project was conducted and the impact it has produced in the Chamber.

1.2 Background and overview of the problem

The information delivery activities in the Chamber of Deputies started in 1823 with the creation of the Library and the Archives. In 1971, following the international tendencies for the period, the Chamber grouped these facilities and other initiatives related to information provision into one department, the Center for Documentation and Information (Cedi). Since then, Cedi has had, among other attributions, the responsibility to support internal and

external public with information products and services. However, balancing these two dimensions of publics in order to serve them efficiently has always been a big challenge.

It is important to consider that in the nineties public administration started to change its processes in order to have a more citizen-oriented basis for the delivery of services. Therefore, started to create multiple channels for the communication with the society, with the objective of benefiting the relationship with them, understand their needs, better deliver services, and to access their satisfaction with public policies. The Chamber of Deputies followed the same strategy; consequently, new routes of communication with the society were established, but without integration with the channels in use. Thus, problems in serving citizens efficiently were generated because of the dispersion of the services, lack of common patterns and rules, and lack of a clear division of responsibilities among the departments in which the channels were running. The current problems were: citizens sending the same request to different channels; the same request being answered by more than one department; different answers for the same request; and requests being transferred from one department to another, influencing timely response.

Dealing with these problems turned out to be time-consuming and a big concern for the institution. It means the image of the Chamber was also very much affected by this scenario.

At the same time that this situation was winding up, the Chamber started, in 2004, its Strategic Management Plan. As a consequence, in 2009, the Chamber's Corporate Strategic Map established its objectives for the period of 2012-2023 that are: (i) "Assure high quality standards for the services offered to representatives, collegiate bodies, and citizens, optimizing communication channels and processes"; (ii) "interact with society for the promotion of citizenship"; (iii) "support with excellence decision making collegiate bodies"; (iv) support and assist with excellence representatives".

These objectives are strongly straightened with the parliamentary role that is to facilitate the external public access to government information and to support members of parliament with timely, reliable and strategic information so that they can meet their obligations as representatives.

As the Chamber was going through its strategic planning, Cedi, for internal reasons, had to undergo its own strategic planning before the institutions' process was completed. Fortunately, this ended up being a great advance in terms of preparation for the fulfillment of the role that Cedi would have to play in the near future. That is to say, Cedi was made responsible for or took part in six out of ten projects set by the Chamber's Strategic Planning process. Among these projects there was the "Relationship Management", with the objective to pursue a corporate model of governance for the relationship with Representatives and the society in the context of information provision.

Therefore, the general goal of the project was to define and implement an integrated system for the management of the exchanges which occur in the process of assisting Representatives and the society in their information needs. Some other objectives were, to contribute with the knowledge management and promote citizenship and influence the image of the Parliament positively. More specific goals were: a) define competencies and responsibilities of each area involved in the process of information deliverance; b) prioritize and redirect processes; c) eliminate redundancies; d); standardize procedures; e) segment customers; f) improve transparency; g) generate data and indicators to support improvements.

Before this project was defined, other isolated initiatives, coordinated by Cedi, had been taken with the intent of promoting integration among the actors involved in the process of

information delivery but had not achieved success due to the lack of assistance and poor involvement of the Chamber's administrative body. However, these initiatives were determinant for the success of the project, once the problem had already been mapped and was aligned with the Chamber's strategic planning.

During the execution of the project an important event for the Brazilian society took place, the enforcement of the Information Access Law, Law 12.527/2011. This law regulated what the Constitution of 1988 had already granted to the society, access to government information. It established practical procedures for the disclosure of information, processing of requests, and time limits for responses. This event promoted a significant impact on the project that had to follow the law guidelines in the remodeling of the processes.

Before the Chamber of Deputies adopted other channels of communication with the society, dissociated from Cedi, most requests from citizens were answered by the Central Inquiry Unit. This work was based on the traditional concepts used for the transferring of information derived from Library Sciences.

One of the main concepts for the professionals that perform in this area is that of being a mediator between the user and the information requested. This mediation was traditionally done by the offering of collections, orientation on the use of materials, and the search on databases. With the development of technology and the advancement of the information society, this mediation turned out to be more specialized and the offering of information products and services more personalized. Professionals invested time and efforts training themselves on communication techniques and research¹ expertise. This evolution had a great impact on the interactions with both the internal and external public.

This advancement together with the reproduction of other channels of communication with the society brought a new challenge, to create synergy among the new areas in charge of responding requests. The synergy, however, could not come only by the adoption of the philosophy and techniques used by librarians and information professional, but also, include elements, ideas and manners utilized by these areas in terms of communication, goals, work processes and vision of future. It was necessary to bring forward a new philosophy able to gather these elements and create the necessary synergy to respond requests following common quality patterns and an integrated workflow. This way, it was possible to consider other approaches for the interactions and transactions that take place between information professionals and the clientele.

All these aspects resulted in the adoption of the philosophy of "Relationship Management" as a strategy towards the goals of the project. In the private sector Customer Relationship Management (CRM) is widely known and has the perspective of attaining customers, generating long-lasting relationships, and optimizing profit. During the first discussions about the project and the effort to size the scope of the problem, the CRM concept showed up as a more suitable and currently used strategy to deal with the challenge of managing the interactions with customers. As a matter of fact, not all the concepts of CRM apply to the government, but to a certain extent, can be adapted to any service of information provision to internal and external publics.

¹ Research in this case refers to the techniques applied by librarians or other information professionals in the process of information provision. It involves the search for data, documents, or information on collections, databases, and other resources. The products can vary from a simple referral to a document to an organized set of information, summaries, and charts.

There are a variety of definitions for CRM in the literature, Alexander Schellong in the book *Citizen Relationship Management* (2008) defines CRM as “essentially a cluster of philosophies, strategies and practices facilitated by technology that are designed to build a customer-centric organization.” In this book, Schellong (2008, p. 1) applies CRM to government as a way of improving customer services in a citizen-oriented perspective. Ultimately, CRM is used to guarantee that clients will be served more efficiently. From this point of view and more specifically considering principles and models of relationship found in literature, it is possible to affirm that CRM is totally applicable to government.

As basic principles for CRM, Schellong (2008, p. 11) identify the following: 1) personalization (products, information, services); 2) customer integration and customer proximity (planning processes, product development, collaboration), 3) interaction (channels, long-term communication, surveys); and 4) customer segmentation (identify the top 20% of customers who make up 80% of the profit, termination of unprofitable customers). Indeed, strategies that guarantee quality management and a customer-oriented culture.

In relation to models, Anderson (2001), cited by Schellong (2008, p. 16), based on a review on relationship development models, suggests four phases in relationship exchange: pre-relationship, negotiation, development and termination. In the same way, when we approach the interactions that take place during a process of information provision, we break it up in phases which are called the negotiation cycle and as a service include the same phases.

The term relationship can also be defined as a process of communication where two or more parts interact or are connected. Being connected means that past interactions occurred and future exchanges may happen. Relationships imply confidence, respect, commitment, and partnership. Only a relationship based on these pillars can be long-lasting. For the government response to the public these pillars are crucial because they directly influence of the Institution.

Since the philosophy of CRM is linked to more consistent concepts of relationship, it was chosen as a reference for the consecution of the project.

2- Relationship Management Project

The project was composed by a team from different areas of the Chamber, all of them involved in the process of interaction for information provision, either with the internal or the external public. These areas were: the Ombudsman, Chief Legislative Office, Secretariat of Communication, Tachygraphy Sector, Center for Documentation and Information (Cedi), the Committee Department, and the Technological Central Unit. It was facilitated by a specialist in project management from the Project Advisory Office. The sponsor was the chief of the Legislative Office. Cedi took over the management of the project for being recognized as the area with the expertise in information provision. One of Cedi's Units is the Central Inquiry Unit (Corpi), responsible for the interactions and information provision.

Some of these areas had been present in other initiatives towards a better understanding of competencies and responsibilities in responding requests. This made it easier to go through the process of developing the project. Even so, and because other areas were integrated, it became necessary to take time for a new round of discussions to scrutinize the problem, align the comprehension about the general scope of the issues involved, and minimize imbalances about the concept of CRM applied to the case.

The methodology adopted was based on the best practices of the Project Management Institute – PMI, together with techniques of participatory process mapping.

This way, although we had the general scope of the problem and some process maps, a survey with the staffs of each area involved was conducted. It was used the focus group technique supported by a planned questionnaire. The purpose of the focus group was to collect qualitative data such as problems, perceptions and suggestions about the work of information provision. Also, it aimed at mapping types of interactions, types of information provided, segments of public, resources, structure and technological support. Another task attributed to the groups were to present rules or official documents that proved their existence, competencies, and responsibilities regarding the activities of providing information or responding requests.

At the end of the survey the project team was able to group the data into key areas as infrastructure, human resources, organization, methods and standards. Each one of these key areas had subdivisions forming a big cloud of apparent problems. The next step was to analyze these problems from the perspective of solutions, so that it would be possible to differentiate symptoms from real problems. As an example, a recurrent “problem” cited was lack of personnel to provide information to the external public and how much this work was getting in the way of the main responsibilities of the department. As a matter of fact, some areas started assuming this task because, as public servants found themselves automatically with the responsibility of providing the information, what led them to look for technological support to keep customers files and other resources to manage the requests. Instead, they could have transferred the request to a department whose main responsibility is to provide information services to those in need.

After this exercise, the team was able to identify a central problem to be attacked and that would, consequently, solve other problems and direct the project to its main objective which was a corporate model of governance for the relationship with Representatives and citizens. The central problem identified was “lack of management, organization, and standards” for the Chamber’s process of serving its customers with information.

Once the main problem was identified, the typology of the interactions was mapped and a glossary began to be produced. The list of common interactions pacified was: information requests, denunciations and complaints, political expressions, suggestions, and compliments.

Simultaneously, the internal regulations that entitle to each area responsibilities and competencies were analyzed in the light of the concepts adopted for the interactions’ types and the role of each one within the institution. This action was decisive to clearly identify the work processes that needed to be changed.

With all this data understood and agreed on, another activity was performed; the definition of levels of interaction, according to the type and complexity of the requests, and also the drawing of a general workflow including the responsibilities of each area. To get to this point, services agreements were necessary.

At the end of this step, the biggest challenge had to be faced. Persuade the key stakeholders about the change and the premises that the team had finally concluded. The approach utilized to negotiate the change process was conducted with the permanent presence of the sponsor who besides being the sponsor was also the highest authority among the stakeholders. There were meetings where the premises and planning for the change was presented and discussed deeply. Fortunately, everyone could realize all the benefits that the change would bring, not only for their areas, but also for the institution.

Based on the agreed rules, a new regulation, with the first guidelines for the relationship with the society was signed by the Chamber's President. This new regulation also contained the general workflow for the interactions to be held with the society, containing the responsibilities of each area and interconnections among them. This regulation treated only about the relationship with citizens because they represented, for that moment, the most crucial problem affecting the whole process. Improvements in the interactions with the internal public would be automatically extended with the benefits achieved by the project.

In order to support this general workflow it was necessary to adopt a technological solution already in use by the Chamber. The Technological Central Unit adapted the solutions from the Ombudsman and Cedi to be a temporary support until the acquisition or the development of a permanent and more suitable system to support the Relationship Management and all its particularities could be carried out. It was decided that the process of acquisition of such system would have to be done through another project, after a deeper process mapping. This mapping would have to contain detailed workflows for each type of interaction, time limits for answers, segmentation of clients, history of transactions, and access to features and accessories necessary to carry on the activities efficiently.

The only work process that was detailed was the interaction "request of information", designed to meet the requirements of the Information Access Law (2012). Together with this workflow the "Citizen Information Service" (SIC), also required by the law, was created. The service provides non-secret official information and documents about the parliament and its work. For this workflow, the project team produced a specific regulation containing the forwarding rules among the departments involved in this kind of information provision. This was necessary because some information may be sensitive but still unclassified, so they must be analyzed before being delivered. The most common information required by the citizens after the law came into force is related to expenditures and contracts, projects and other general data. The Service is very much committed to publicize, independently from request, information highlighted by the law and those that contribute to transparency.

After the definition of these rules, workflows, procedures and, tools, the team voted for the creation of a steering committee. This way, the Relationship Management Committee which is responsible for making these set of governance agreements move forward was born. Cedi, through Corpi, took over the coordination of the Committee and the members were indicated by the stakeholders.

The project team also handled a list of requirements that should be present in a technological support for the Relationship Management. From this point, the stakeholders voted for a new project to resolve definitely the technological issue. This project was approved and is now part of the Chamber's corporate project portfolio for 2013-2014.

The Relationship Management project was considered a successful experience by the Strategic Management Department, the stakeholders, and the team. A success not only from the perspective of the deliverance of what was promised, but also because of the impact it produced in the institution.

First of all, as a corporate project it counted on the stakeholders' engagement, a motivated and skilled team, and a sponsor totally committed in facilitating the organizational support. All of these aspects together with an effective communication were crucial for the success of the project.

Secondly, the understanding of the scope of the problem and the alignment of the ideas created synergies and mutual respect, what made possible significant change in work

processes. It also prepared the team for the management of the risks that showed up during the execution of the project.

Thirdly, work processes started to be changed as soon as the problems were detected and work agreements were settled. As the new processes proved to be fair and viable, the team felt empowered to go on in the course of change. Consequently, the silos were eliminated and now the information requests can be more efficiently delivered to the public. Moreover, other advantages are being achieved, such as: continuous improvement of the process; establishment of standards; construction of a common knowledge base; permanent forum for dealing with issues regarding information deliverance; and the establishment of an advisory board through the Committee of Relationship Management for the issues involving information provision.

Finally, there are still other challenges to be faced like the implementation of a new technological system, able to definitely integrate all the areas and processes necessary for the relationship with customers. But, it is believed that the most difficult barriers have been overcome since now everyone knows their responsibilities and work collaboratively in providing information. Consequently, the interactions are more efficiently carried out reflecting positively in the image of the Parliament.

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