



WOKINGHAM BOROUGH COUNCIL

A Meeting of an **INDIVIDUAL EXECUTIVE MEMBER DECISION** will be held in LGF7 - Civic Offices, Shute End, Wokingham RG40 1BN on **TUESDAY 29 NOVEMBER 2022 AT 9.30 AM**

Susan Parsonage
Chief Executive
Published on 21 November 2022

Note: Non-Committee Members and members of the public are welcome to attend the meeting or participate in the meeting virtually, in line with the Council's Constitution. If you wish to participate either in person or virtually via Microsoft Teams please contact Democratic Services. The meeting can also be watched live using the following link:
<https://youtu.be/uDezLdPTKrY>

Please note that other people may film, record, tweet or blog from this meeting. The use of these images or recordings is not under the Council's control.



WOKINGHAM BOROUGH COUNCIL

Our Vision

A great place to live, learn, work and grow and a great place to do business

Enriching Lives

- Champion outstanding education and enable our children and young people to achieve their full potential, regardless of their background.
- Support our residents to lead happy, healthy lives and provide access to good leisure facilities to complement an active lifestyle.
- Engage and involve our communities through arts and culture and create a sense of identity which people feel part of.
- Support growth in our local economy and help to build business.

Safe, Strong, Communities

- Protect and safeguard our children, young and vulnerable people.
- Offer quality care and support, at the right time, to prevent the need for long term care.
- Nurture communities and help them to thrive.
- Ensure our borough and communities remain safe for all.

A Clean and Green Borough

- Do all we can to become carbon neutral and sustainable for the future.
- Protect our borough, keep it clean and enhance our green areas.
- Reduce our waste, improve biodiversity and increase recycling.
- Connect our parks and open spaces with green cycleways.

Right Homes, Right Places

- Offer quality, affordable, sustainable homes fit for the future.
- Build our fair share of housing with the right infrastructure to support and enable our borough to grow.
- Protect our unique places and preserve our natural environment.
- Help with your housing needs and support people to live independently in their own homes.

Keeping the Borough Moving

- Maintain and improve our roads, footpaths and cycleways.
- Tackle traffic congestion, minimise delays and disruptions.
- Enable safe and sustainable travel around the borough with good transport infrastructure.
- Promote healthy alternative travel options and support our partners to offer affordable, accessible public transport with good network links.

Changing the Way We Work for You

- Be relentlessly customer focussed.
- Work with our partners to provide efficient, effective, joined up services which are focussed around you.
- Communicate better with you, owning issues, updating on progress and responding appropriately as well as promoting what is happening in our Borough.
- Drive innovative digital ways of working that will connect our communities, businesses and customers to our services in a way that suits their needs.

For consideration by

**Sarah Kerr – Executive Member for Climate Emergency and Resident Services, and
Clive Jones – Leader of the Council**

Officers Present

Glynn Davies, Head of IT

Callum Wernham, Democratic & Electoral Services Specialist

IMD NO.	WARD	SUBJECT
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IMD 2022/18	None Specific	CORPORATE CRM SYSTEM PROCUREMENT 5 - 38
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EXCLUSION OF THE PRESS AND PUBLIC

The Individual Executive Members may exclude the press and public in order to discuss the Part 2 sheets of the above agenda item and to do so it must pass a resolution in the following terms:
That under Section 100A (4) of the Local Government Act 1972, the public be excluded from the meeting for the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A of the Act (as amended) as appropriate.

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Agenda Item IMD18

INDIVIDUAL EXECUTIVE MEMBER DECISION

REFERENCE IMD: IMD 2022/18

TITLE	Corporate CRM System Procurement
DECISION TO BE MADE BY	Executive Member for Climate Emergency and Resident Services - Cllr Sarah Kerr, Leader of the Council - Cllr Clive Jones
DATE, MEETING ROOM and TIME	29 November 2022 LGF7 at 09:30am
WARD	None Specific;
DIRECTOR / KEY OFFICER	Chief Operating Officer - Sally Watkins

PURPOSE OF REPORT (Inc Strategic Outcomes)

The purpose of this report is to agree the procurement of a new Customer Relationship Management System (CRM)

The proposed procurement is to contract Netcall – Liberty Create for a 5-year term.

RECOMMENDATION

That the Executive Member for Climate Emergency and Resident Services and the Leader of the Council agree the procurement business case, set out within the Part 2 documentation, to direct award a 5-year contract to Netcall for the Liberty Create CRM via Lot 1 Digital - of the 'Patient/Citizen Communication & Engagement Solutions' NHS SBS framework.

SUMMARY OF REPORT

A Customer Relationship Management (CRM) is a crucial technology used by the Council to efficiently manage interactions with customers. A CRM helps to build a picture of the interactions a customer has had with the Council and can support the automation and streamlining of processes. It is a key enabler for efficiency and can help to improve the customer experience.

As part of the Digital & Technology Strategy 2021-2026, the Council is looking to develop cost effective, agile and flexible digital services which meet the changing needs of customers and staff.

To achieve this priority and respond to user feedback, the council has explored the procurement of an improved CRM system which will provide an intuitive low code interface. This will enable faster development of new CRM services for the Council, improved flexibility to improve existing CRM services and an easy to use digital interface for customers to request services from the Council.

Selecting a supplier that is able to offer a proactive development support package will also help ensure the CRM is maintained more effectively, and future proof support and knowledge within the CRM Development Team

This software will also allow us the opportunity to develop the Council's digital accessibility offering on the CRM to ensure that the digital offering is inclusive of all residents.

Background

The Council is keen to adopt technology that better meets organisational and customer need through the implementation of a new Low Code CRM system (Netcall Liberty Create). This proposed solution will enable the Council to be more agile, improve the customer experience, enhance the digital offering and be more cost effective.

Moving to this solution will enable us to overcome challenges with our legacy platform:

- **Expensive licensing model** based on number of internal users, which means additional cost to implement the solution more widely
- **Slow development time** to deliver new digital services or make changes to existing ones, which means the Council is less agile and cannot quickly react to changing circumstances when required
- **Slow and laborious deployment time** for new services that have been developed, meaning the council has struggled to realise benefits quickly
- **Low code development options that are available are difficult to leverage**, impacting time to deliver on improvements

Business Case (including Analysis of Issues)

This detail is contained in the following documents which need to be reviewed as part 2 documentation as they contain commercially sensitive information.

1. CRM Procurement Business Case – approved by Strategic Procurement Board on the 13th October 2023
2. CRM Options Appraisal – produced by external industry experts; McGowen Associates

FINANCIAL IMPLICATIONS OF THE RECOMMENDATION

The Council faces severe funding pressures, particularly in the face of the COVID-19 crisis. It is therefore imperative that Council resources are focused on the vulnerable and on its highest priorities.

	How much will it Cost/ (Save)	Is there sufficient funding – if not quantify the Shortfall	Revenue or Capital?
Current Financial Year (Year 1)	£160,000	Yes, this will be paid from Capital funding	Implementation costs are funded by Capital funding.
Next Financial Year (Year 2)	£150,000	First year of licensing will be paid from existing Capital funding	First year funding of new CRM funded from Capital.
Following Financial Year (Year 3)	£150,000	Revenue funded; no additional budget required as covered by budget of existing CRM that we will cease to pay from April 2024	CRM licensing funded from existing Revenue.

Other financial information relevant to the Recommendation/Decision
<p>Year 1 costs include:</p> <ul style="list-style-type: none"> - 160k of implementation costs (Capital) <p>Year 2 costs include:</p> <ul style="list-style-type: none"> - 150k of license costs (Capital) <p>Year 3 costs include:</p> <ul style="list-style-type: none"> - 150k of license costs (Revenue)

Cross-Council Implications
<p>CRM is used by services across the Council such as Waste, Blue Badges and Complaints. This would enable us to more widely implement the solution to increase efficiency and a true site wide approach to CRM deployment</p> <p>Having an effective CRM is vital to the priorities and strategic objectives of the Council, to improve services to residents and be able to fully implement the ambitions in the Digital and Technology strategy.</p>

Public Sector Equality Duty
<p>An equalities assessment has been completed as part of this project, with the outcome to all questions being neutral or no impact</p>

SUMMARY OF CONSULTATION RESPONSES	
Director – Resources and Assets	No comment
Monitoring Officer	No comment
Leader of the Council	No comment

Reasons for considering the appendices to the report in Part 2
<p>Procurement Business Case and Independent Options Appraisal to be considered as part 2 documents as these contain commercially sensitive costings of various suppliers.</p>

List of Background Papers
<ol style="list-style-type: none"> 1. CRM Procurement Business Case – approved by Strategic Procurement Board on the 13th October 2023 2. CRM Options Appraisal – produced by McGowen Associates

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