

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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