

Committee(s)	Dated:
IT Sub-Committee – For Information	2 nd November 2018
Subject: Customer Relationship Management Project Update	Public
Report of: The Chamberlain	For Information
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Summary

This report sets out the approach for managing personal information across both City Dynamics and City Services – in response to questions raised at the last IT Sub Committee.

Recommendation(s)

Members are asked to:

- *Note the report.*

Main Report

1.0 Background

- 1.1 The CRM Project seeks to replace the current Corporate CRM (CRM 2011) with two separate solutions. City Dynamics (Dynamics 365) will provide functionality to manage the Corporation's Strategic Engagement activity and Events. City Services (Firmstep) has been implemented in the Contact Centre for managing customer transactions including reports, applications, bookings and payments. Firmstep will also provide a customer portal for online transactions.

2.0 City Dynamics – Personal Data

- 2.1 Contact Record data held in City Dynamics is limited to an individual's professional or ceremonial roles which includes name, job title, organisation and professional contact details. Records of activities involving Contacts, such as meetings, will also be held on City Dynamics, with the ability to attach information or documents such as an agenda, meeting papers or briefing notes.
- 2.2 Personal data has been taken from the current CRM system (Dynamics 2011) and spreadsheets held within departments and has been subject to a lengthy

process of de-duplication, verification and a legitimate interest assessment
The information has also been enriched through working with Experian.

- 2.3 The City Dynamics functionality has been developed to 'walk' users through a legitimate interest assessment when contact records are added. A series of 'check boxes' must be actively ticked before a record can be saved. Once a new record is saved, an automated e-mail will be sent to the contact notifying that their information is being held and provide a link to the Corporation's Privacy Notice held on the Corporate website. This will also be done when the initial data set is migrated to City Dynamics.
- 2.4 The central support team will monitor records to ensure that they are regularly reviewed by their assigned owners. Where a record has not been used for 3 years it will be deactivated, and assuming it remains deactivated, then it will be deleted a year later.
- 2.5 In the case of Events Management, dietary and special access requirements will also be held for the duration of the Event record only. This information will be requested when Guests register for the event online. Corporation Officer and Member dietary and special access information will be updated annually.

3.0 City Services – Personal Data

- 3.1 For City Services, current customer data from the CRM 2011 will be deleted. When transacting with the Contact Centre or with the Corporation online, customers will be invited to create an account on the new Firmstep platform – though this will not be mandated. Data held on Firmstep will be subject to the 3+1 retention schedule, as outlined above for City Dynamics.

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