

## **CRM Project Financial Update**

### ***Background***

The Customer Relationship Management (CRM) Gateway 5 Report was approved in October 2017. The approved project consisted of two elements, City Services (using a product called Firmstep) and City Dynamics (using a product call MS Dynamics 365).

City Services was allocated a budget of £189k. City Dynamics was allocated a capital budget of £49k, as the intention was to largely deliver the project using 'in house' resource. Given the complexities in the depth and breadth of the project, the City Dynamics project undertook a procurement exercise to provide external configuration support to deliver the project within the required timescales.

An additional £105k was allocated from the Transformation Fund in August 2018 to enable the procurement of the additional resources required.

Project	Sub Task	Original Value October 2017	Amended Value August 2018	Variance
Customer relationship Management		£238,000	£343,000	£105,000
32100038	CRM- City Services	£189,000	£189,000	£0
	3A Staff Costs	£30,000	£30,000	£0
	Fees	£30,000	£30,000	£0
	Purchases	£129,000	£129,000	£0
32100039	CRM - City Dynamics	£49,000	£154,000	£105,000
	3A Staff Costs	£26,000	£26,000	£0
	Fees	£23,000	£128,000	£105,000

### ***Updated Financial Position***

- 1) For **City Services** there is **£33,384.50 remaining** of the original budget for committed spend, which consists of additional consultancy days, and the implementation costs for the Business Portal and the Calendar Bookings functionality.
- 2) For **City Dynamics** there is **£11,075 committed spend** with the external consultancy Orange Maple. This remaining spend is to address outstanding high priority bugs and ensure a handover to BAU support.

There is **£938 that remains unspent** / uncommitted.

### ***SEEMs system***

- The new Microsoft Dynamics platform has been set up for SEEMs, and is largely operational, with IT continuing to work on the Events functionality.
- Data from across teams and departments has undergone an initial deduping exercise and been transferred onto the system. Users are now being trained in the system and starting to use it to clean and organise their data.

### ***User Training***

- Over 40 users across various teams have been trained, including both Strategic Engagement and Events users from Mansion House, Old Bailey, Remembrancers, Corporate Affairs, EDO; The remaining 70 users will be trained over the coming month, including the Brussels and Asia offices
- Users have been made aware of the importance of complying with GDPR and the Freedom of Information requirements
- Users have been trained and understand the benefits of managing Organisation and stakeholder relationships from a single open platform

### ***Events Management***

- While the system is largely functional for Strategic Engagement users, IT are still working on the Events functionality that will enable users to set up and run events.
- The Events functionality is a critical next step – IT to update on the timetable for this

### ***Staffing***

- The former CRM function and the City Occupiers Database (COD) function have now been separated, with the accompanying division of roles and responsibilities. COD has moved to the Electoral Services team, and new Business Intelligence Unit is being set up in EDO.
- Recruitment has been carried out for the new Business Intelligence Function, with three individuals due to start in late February and March.