

Committee(s) Digital Services Sub Committee	Dated: 26 th September 2019
Subject: Customer Relationship Management - Update	Public
Report of: Chamberlain	For Information
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Summary

This report provides an update on the Customer Relationship Management Project, which commenced in December 2017. Two key areas of the project – the Contact Centre (City Services) and Strategic Engagement (City Dynamics) are now complete, with the remaining elements due for completion by the end of 2019.

Main Report

Background

1. In June 2017, Summit agreed that the IT Division take Strategic Ownership of the Corporate CRM Solution, which went out of mainstream technical support on 12th July 2016. Summit approved a hybrid approach to the replacement of CRM, which distinguished between the traditional 'local authority' elements of the organisation and the more unique elements of Stakeholder and Events Management.
2. The approach specified a 'CRM Lite' model (City Services) for transactional interactions through the Contact Centre and online, including payments, applications, requests and bookings. For the 'purer' CRM elements such as relationship and events management, the approach recommended Microsoft Dynamics 365 (City Dynamics), given the in-house skills and the alignment with the broader IT Strategy direction towards Microsoft Office 365.
3. In July 2017 a Gateway 1-4 Paper was approved at Projects Sub Committee for the initiation of a project to replace CRM 2011. The Committee approved a budget of £238,500 for the implementation of both CRM solutions. An additional £70k was approved by Committee in April 2018.

City Services (Firmstep)

4. The tender for City Services was advertised in September 2017, with supplier demonstrations and evaluation undertaken in early October 2017. The Gateway 5 Paper granted approval to start work in October 2017 and the City Services contract was awarded to Firmstep in November 2017. Implementation began in January 2018.
5. The City Services workstream contains several different elements;
 - Firmstep SERVICE module for use by the Contact Centre (Live);

- Firmstep FORMS for online transactions (104 Forms are now Live);
 - Firmstep SELF module – the online Self Service portal (awaiting Go Live date) and;
 - Shopify E-Commerce Platform to replace the Online Shop (testing).
6. The Contact Centre module (SERVICE) went live in August 2018. Feedback from the Contact Centre has been very positive, principally around the ease of use and time savings. Firmstep is being used successfully following the move to the Joint Contact and Control Room (JCCR), which took place earlier this year. The Project Team continue to work with the Contact Centre to deliver further enhancements.
7. There are 104 forms on the live Firmstep Platform. One of the challenges for the project has been balancing the requests for new forms and online transactions with the other implementation activities. Significant functionality has been delivered using Firmstep FORMS in the last 18 months;
- Creation of a new Starters, Movers and Leavers Form, including an automated approvals process;
 - Development of a Fault Reporting Form for the new Veolia Cleansing Contract, including a two-way integration with the Veolia back office system (ECHO);
 - Many new online payment forms (including Swimming Season Tickets, Car Pound Payments and Traffic Management Payments).
8. The Firmstep Online Portal (SELF) has been developed and tested, however is dependent upon the completion of the Online Shop replacement before it can go live as it requires the current website functionality to be decommissioned. Testing of the Online Shop will begin in September 2019, and so, the launch of the Online Portal and Online Shop is targeted by the end of 2019.

City Dynamics

9. The City Dynamics functionality has been delivered in partnership with third party Dynamics 365 consultants, Orange Maple. An initial proof of concept exercise was undertaken by Orange Maple in September 2017.
10. The City Dynamics workstream comprised the following elements;
- Strategic Engagement (completed);
 - Events Management (ongoing)
 - City Occupier Database (awaiting Go Live date)
 - Mansion House Correspondence (no longer required)
11. Development of the Strategic Engagement solution commenced in November 2017 and, after initial demonstrations in December 2017, the Strategic Engagement solution was made available for testing in March 2018. Since that time the project timeline has been impacted by several significant challenges including change in scope and loss of critical business resources during development and testing. A tender for additional external support was published and awarded in April 2018, following approval of £70k additional

funding. The Strategic Engagement functionality went live in June 2019 and is now in use across Town Clerk's, Remembrancer's and Mansion House.

12. The City Occupier Database (COD) has also been developed and is awaiting confirmation on a go live date. The new functionality will enable COD Officers to complete the annual survey on a mobile device and includes several other enhancements.
13. The Events Management functionality development is ongoing, but following a series of detailed sessions in August 2019, the initial phase of functionality is targeted to go live before the end of the year.
14. The Project Team continue to work with the Business Intelligence Unit (based in Innovation and Growth) to further enhance the City Dynamics functionality, and plan further phases of work.

Future Opportunities

15. There are significant opportunities to expand the use of both City Services and City Dynamics and realise further benefits across the City of London Corporation. Some of the initial opportunities include;
 - Replacement of PDF Forms on the Corporate Website (103 identified which customers currently need to print, complete and return);
 - Creation of Online Transactions, with two-way integration to the new Public Realm Case Management System;
 - Online Bookings for sports facilities across Open Spaces;
 - Online Direct Debit Mandate;
 - New Online Payment Forms to promote channel shift from Telephone payments or cheques;
 - Development of an Online Tenant Portal for Commercial Property Tenants;
 - Replacement of the Hazardous Waste system (HAZCOL);
 - Development of Dashboards to provide an overview of Strategic Engagement activity and Events;
 - Move the Corporate Property Advisory Team onto City Dynamics to facilitate more effective information sharing and intelligence;
 - Increased utilisation of the Online Shop for selling products online across multiple departments – with an opportunity to centralise and standardise the retail offer;
16. The IT Division will work with colleagues to schedule development projects for the opportunities outlined above and where external resources and licences are required create the relevant business cases to request funding.

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