



Lighthouse Project Discovery Playback City of London Corporation

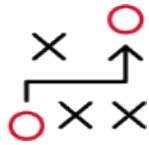
The Objective

For each service area Hitachi Solutions looked to understand...



Customer Experience

Current "As-is" High Level customer journey of the system
 Issues with UX/UI of current system
 Pain points



Purpose and Use

Intended purpose and use of system and data within it
 Security and restriction requirements
 Consent, GDPR



Systems

Description and vendor
 Technology used
 Cost and maintenance



Data

Type
 Quality
 Format
 Duplication
 Retention

Recommendations:

1. How can the City improve the customer journey?
2. How best can the systems be consolidated towards a single version of the truth?
3. How can efficiencies and savings be achieved against the Corporation's objectives?
4. What change support and/or training could help?

Analysis Summary

Summary



- ✔ 9 workshops / stakeholder interviews
- ✔ 19 people involved
- ✔ 24 data sources considered
- ✔ We considered:
 - Customer & user experience
 - System purpose and cost
 - Data quality & structure

Observations Summary

PROCESS

- ✔ Multiple **disconnected tools** and **applications** are used to support key processes.
- ✔ Significant amount of **manual, time-consuming tasks** and **workarounds**.
- ✔ Areas and functions across the Corporation **operate independently in silos** and tend to not share information as the areas do not know what information is available.
- ✔ Certain information relies on individuals' knowledge and memory, indicating a **risk in knowledge retention**.
- ✔ Individuals and organisations are contacted multiple times by disparate areas and functions without visibility, leading to potential **irritation/frustration** with the Corporation.

DATA

- ✔ Some areas **lack established processes**, raising concerns about compliance with GDPR principles.
- ✔ **Historical contacts** lack documented evidence for consent, posing potential risks.
- ✔ 81k records were included in our data profile
- ✔ The overall quality of data could be improved, to reduce duplication, population and update outdated information.
- ✔ Up to **45% data duplicated** between systems.
- ✔ Certain information, such as electoral data, cannot be shared due to regulatory restrictions.

Key Activities vs Technology Touchpoints

	Electoral services	SEEMS		Innovation and Growth Marketing	Destination City Programme	City Belonging Project	Small and Medium Enterprise	Contact Programme (Planning delivery)
		Strategic Engagement	Events					
Activities	<ul style="list-style-type: none"> Electoral registration Annual canvass Ad hoc request from Court, Political Parties, Credit Rating Agencies 	<ul style="list-style-type: none"> Recording key Organisations and Contacts Composing stakeholders' briefings Managing strategic partners and recording relevant activities 	<ul style="list-style-type: none"> Event organisation and management Managing event guests Email templates creation Creating Account and Contact records Planning table sitting 	<ul style="list-style-type: none"> Newsletters Analysing email communication performance 	<ul style="list-style-type: none"> Event organisation and management Promoting City as a and attracting visitors Newsletters & ad-hoc communications CHARN (City Hotel Attraction and Retails Network) City Culture Network Amplification management Organising photo shots and recording consent to use photos 	<ul style="list-style-type: none"> Promoting more inclusive and connected Square Mile Event organisation Supporting electoral services and encouraging organisations to register for voting 	<ul style="list-style-type: none"> Managing membership network Managing partners' network Running business advice sessions 	<ul style="list-style-type: none"> Attracting new organisations & businesses to the City Contacting new business and presenting the Programme Supporting existing business & organisations Help with rental leases
Tools & Apps								

Case for Change

CHALLENGES TO RESOLVE

- ❑ No unified single source of truth to inform decision-making
- ❑ Consent cannot be tracked across service areas risking GDPR compliance.
- ❑ The extent of manual processes is limiting operational efficiency and productivity.
- ❑ Lack of data governance exposes the Corporation to reputational damage risk.

IMPROVEMENT OPPORTUNITIES

- ❑ Enhance the customer journey and satisfaction.
- ❑ Stakeholders agree on the need to a corporate CRM system
- ❑ Align Business and IT strategy to support Corporate Plan 2024-2029.
- ❑ Empower forward-thinking and collaborative atmosphere.



Recommendations Summary

PROCESS

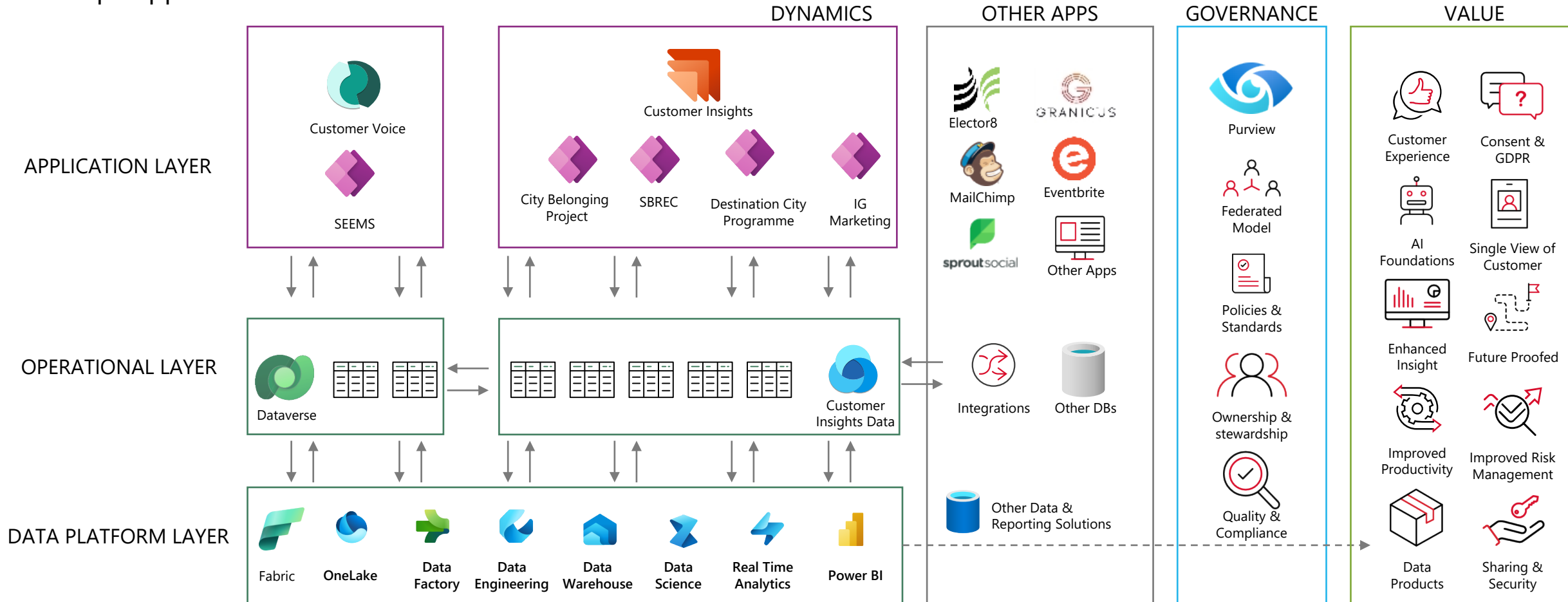
- ✓ Replace spreadsheets with a **single, user-friendly application**.
- ✓ Aligning **roles** and **responsibilities** as well as permissions and tasks within a new tool to simplify and **streamline the processes** making them **more efficient** and **saving time**.
- ✓ Introduce a **single platform for requesting** and **storing consent** and agree on a Corporation-wide process how **subject access requests** are dealt with.
- ✓ Design a **joined-up, end-to-end customer journey** and **consistent approach** for “welcoming” new businesses and organisations to City of London.

DATA

- ✓ Integrate data from multiple source systems to provide a **single “customer” view** across the Corporation.
- ✓ **Cleanse and deduplicate** data where necessary.
- ✓ Agree on **roles and responsibilities** for the data quality assurance and develop policies and **standards for data management**.
- ✓ Provide appropriate training and create guidance resources.
- ✓ Setup a **Centre of Excellence (CoE)** to support the Corporation on the new CRM platform.
- ✓ Automate repetitive data tasks.
- ✓ Enhance **analytics and reporting**.

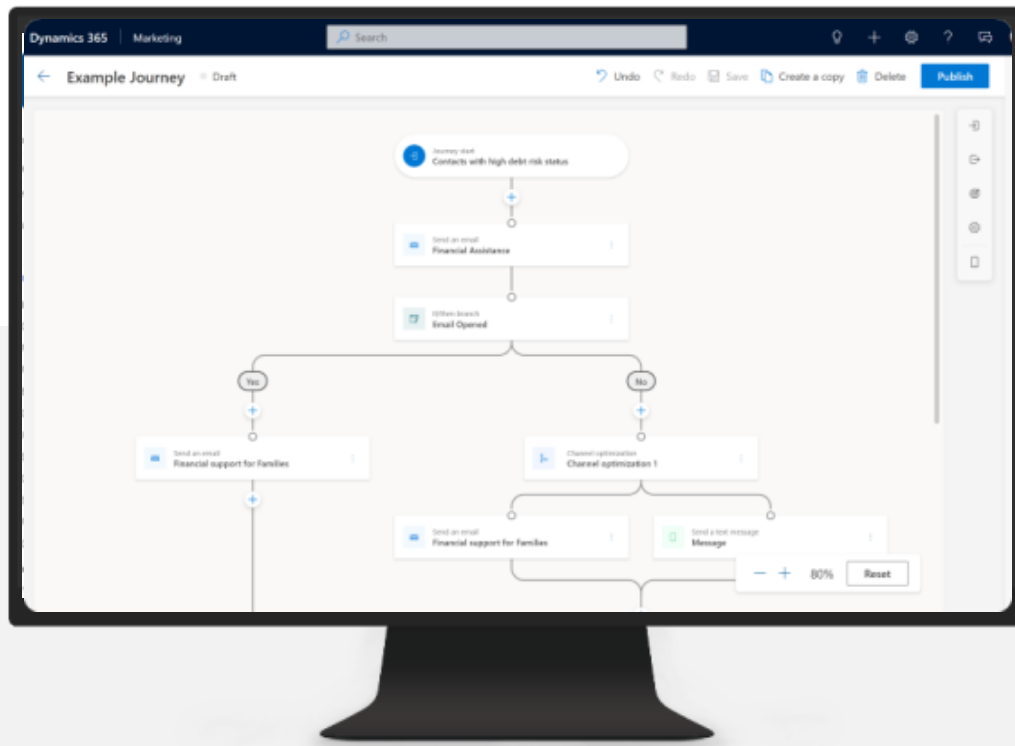
Future Vision – Marketing Automation & Data Mesh

In Scope applications



Customer Insights Overview

Turn shared data into personalised actions



360 degree profile

- Single view of all the information we have about that company and their activities. Including all the key stakeholders and contact details
- Apply third party enrichments (company data, location data etc)
- Create intelligent segments based on actions or company information

Engagement

- Automatically manages consent
- Automate communications based on real time actions
- Use information to create intelligent segments
- Dashboards to understand engagement across all departments
- Event management and outreach
- Copilot to support efficiency

Corporate CRM **Estimated Costs**

Estimated Costs

- **Development** – £120k utilising existing contract resource
- **Licencing** – Customers Insights (starting from £18k per annum)
- **Support** – Tier 2 support – 2 additional roles (£140k per annum), Tier 3 support – 1 additional role (£90k per annum)

- **One Off Cost (CAPEX)**- c£120k
- **Ongoing Cost (OPEX)** – c£248k per annum (cost will increase based on usage)

