

<b>Committee(s)</b>	<b>Dated:</b>
IT Sub-Committee – For Information	10 <sup>th</sup> July 2018
<b>Subject:</b> Customer Relationship Management Project Update	<b>Public</b>
<b>Report of:</b> The Chamberlain	<b>For Information</b>
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### **Summary**

This report sets out progress to date and future timescales for the implementation of City Services and City Dynamics. City Services has experienced some delays due to technical integration issues but is now due to go live for the Contact Centre by the end of July 2018, ahead of the move to the Joint Contact and Control Centre. City Dynamics is on course to go live with Strategic Engagement in July 2018, subject to the cleansing and migration of data. Events Management configuration is progressing well using an Agile approach and is due to go live in September 2018. By this date, all non-compliant data held in CRM 2011 will have been deleted, with a fully cleansed data set migrated to the new City Dynamics platform.

### ***Recommendation(s)***

*Members are asked to:*

- *Note the report.*

### ***Main Report***

#### **1.0 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 12<sup>th</sup> 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.

## **2.0 City Services**

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.
5. The implementation of City Services commenced in January 2018 and is progressing. The key dependency for the project remains the movement of the Contact Centre, into the Joint Contact and Control Room (JCCR), which is scheduled for August 2018. The system is on course to go live with the 'Service module' towards the end of July, which will facilitate the move of the Contact Centre.
6. The decision has already been taken that no Contact Centre customer data from CRM 2011 will be migrated to City Services, and customers will be asked to sign up for a new account and give express consent to hold their data – in line with GDPR. The only data that will be retained, will be transaction data, which must be held for 6 years.

## **3.0 City Dynamics**

### **3.1 Strategic Engagement**

7. An initial proof of concept exercise with an external supplier commenced in September 2017. The intention was to better understand the Events Management requirements ahead of the Strategic Engagement implementation. This ensured that a holistic view was taken on the system configuration – to ensure that the two separate applications would 'dovetail'. On 30<sup>th</sup> October the Events Management Proof of Concept was finalised and agreed by representatives from across the Events Teams.
8. Development of the Strategic Engagement solution commenced in November 2017. An early demonstration of the embryonic Strategic Engagement solution was provided on 4<sup>th</sup> December 2017, with a second demonstration provided on 18<sup>th</sup> December 2017. Further detailed walkthroughs were held with key individuals in early January 2018, where additional requirements were highlighted.
9. The Strategic Engagement configuration has included both the provision of the Dynamics 365 platform, as well as the Strategic Engagement application itself. As such, this work will lay the foundation for all future City Dynamics applications.

Development work has been delayed due to complications in configuration and emerging requirements around data migration and GDPR. There is now clarity on how GDPR compliance can be built into City Dynamics, and data cleansing is progressing.

10. System testing for the Strategic Engagement solution commenced at the end of April 2018, and initial user testing took place in May 2018. Additional GDPR requirements and outstanding development tasks have extended the development time for the system, however user training and go live are now scheduled for July 2018. The Comptroller and City Solicitor's department have been engaged in the specification and development of the new system to ensure GDPR compliance. A demonstration of the final solution was provided on 2<sup>nd</sup> July.

### **3.2 *Events Management***

11. Configuration of the Events Management solution began in June with a view to delivering a 'minimum viable product' in July 2018. There is a quiet period for CoL Events in August, therefore it is intended that all user testing and training will take place in this month. Additional functionality such as electronic invitations, online registrations, and barcode scanning for guest check ins will be delivered over September and October.
12. To ensure that the tight deadline is met, an Agile delivery method is being used. This will mean that 'must have' requirements will be configured first, with other 'could have' elements subject to time and budget. This carries a risk that these will be deferred to a later stage of the project, however this approach will ensure that the timescales are met, and that the Corporation is ready to go live with new Events Management solution in September 2018.

### **3.3 *City Correspondence and City Occupier Database***

13. City Correspondence (formerly Mansion House Correspondence) and the City Occupier Database (annual survey of businesses within the square mile) have been redeveloped in house and will be moved from CRM 2011 to the new City Dynamics platform.

## **4.0 CRM 2011 – Decommission**

14. With the approaching GDPR legislation, the decommissioning of the infrastructure remains secondary to the cleansing and deletion of data that is deemed non-compliant. With the launch of City Services in June 2018 all Contact Centre data (except transactions) will be deleted at this time. Events Management in City Dynamics is due to be live in September 2018, therefore non-compliant Events data held in CRM 2011 will be deleted at this time – allowing for a brief period of 'dual running'.
15. There are some remaining elements such as the Corporation's Online Shop which will remain dependent upon the CRM infrastructure until later in the year. As such,

it is likely that the CRM 2011 infrastructure will remain in place until the end of 2018  
– however there will be no non-compliant data held in the system at this time.

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