



## Digital Services Committee

**Date:** THURSDAY, 5 SEPTEMBER 2024

**Time:** 2.00 pm

**Venue:** COMMITTEE ROOMS - WEST WING, GUILDHALL

**Members:**

|                                   |   |
|-----------------------------------|---|
| Deputy Dawn Wright (Chair)        | Caroline Haines, Policy & Resources Committee (Ex-Officio Member)       |
| Eamonn Mullally (Deputy Chairman) | Judith Pleasance  |
| Deputy Randall Anderson           | Alderman Sir William Russell, Barbican Centre Board (Ex-Officio Member) |
| Ian Bishop-Laggett                | Deputy James Thomson, City Bridge Foundation Board (Ex-Officio Member)  |
| Deputy Timothy Butcher            | James Tumbridge   |

**Enquiries:** Kate.Doidge  
Kate.Doidge@cityoflondon.gov.uk

### Accessing the virtual public meeting

Members of the public can observe all virtual public meetings of the City of London Corporation by following the below link:

<https://www.youtube.com/@CityofLondonCorporation/streams>

A recording of the public meeting will be available via the above link following the end of the public meeting for up to one civic year. Please note: Online meeting recordings do not constitute the formal minutes of the meeting; minutes are written and are available on the City of London Corporation's website. Recordings may be edited, at the discretion of the proper officer, to remove any inappropriate material.

Whilst we endeavour to livestream all of our public meetings, this is not always possible due to technical difficulties. In these instances, if possible, a recording will be uploaded following the end of the meeting.

**Ian Thomas CBE**  
Town Clerk and Chief Executive

# AGENDA

## Part 1 - Public Agenda

1. **APOLOGIES**

2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**

3. **MINUTES**

To agree the public minutes and non-public summary of the meeting held on 24 July 2024.

**For Decision**  
(Pages 5 - 8)

4. **DATA LIGHTHOUSE PROJECT UPDATE**

Report of the Chamberlain.

**For Information**  
(Pages 9 - 26)

5. **ENTERPRISE RESOURCE PLANNING (ERP) PROGRAMME UPDATE**

Joint report of the Chief People Officer and the Chamberlain.

**For Information**  
(Pages 27 - 30)

6. **DIGITAL, INFORMATION, AND TECHNOLOGY SERVICE (DITS) - SERVICE DELIVERY SUMMARY**

Report of the Chamberlain.

**For Information**  
(Pages 31 - 36)

7. **CITY OF LONDON CORPORATION APP**

The Chamberlain to be heard.

**For Information**  
(Verbal Report)

8. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

9. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT**

10. **EXCLUSION OF THE PUBLIC**

MOTION - That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting for the following items on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

**For Decision**

**Part 2 - Non-Public Items**

11. **NON-PUBLIC MINUTES**

To agree the non-public minutes of the meeting held on 24<sup>th</sup> July 2024.

**For Decision**  
(Pages 37 - 40)

12. **HR, PAYROLL, AND FINANCE SOLUTION: ENTERPRISE RESOURCE PLANNING (ERP)**

Report of the Chamberlain

**For Decision**  
(Pages 41 - 46)

13. **DATA PROTECTION - 2023 ANNUAL REPORT**

Report of the Comptroller and City Solicitor and Deputy Chief Executive.

**For Information**  
(Pages 47 - 72)

14. **DIGITAL, INFORMATION, AND TECHNOLOGY SERVICE (DITS) - RISK UPDATE**

Report of the Chamberlain.

**For Information**  
(Pages 73 - 80)

15. **CYBER SECURITY UPDATE**

Report of the Chief Information Security Officer.

**For Information**  
(Pages 81 - 126)

16. **VETTING POLICY**

**For Information**  
(Verbal Report)

17. **REPORT OF ACTION TAKEN**

Report of the Town Clerk.

**For Information**  
(Pages 127 - 132)

18. **NON-PUBLIC QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

19. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

## DIGITAL SERVICES COMMITTEE

Wednesday, 24 July 2024

Minutes of the meeting of the Digital Services Committee held at Guildhall, EC2 on Wednesday, 24 July 2024 at 2.00 pm

### Present

#### Members:

Deputy Dawn Wright (Chair)  
Eamonn Mullally (Deputy Chairman)  
Deputy Randall Anderson  
James Tumbridge

#### Officers:

|                      |                            |
|----------------------|----------------------------|
| Caroline Al-Beyerty  | - The Chamberlain          |
| Zakki Ghauri         | - Chamberlain's Department |
| Sam Collins          | - Chamberlain's Department |
| Dawit Araya          | - Chamberlain's Department |
| Charlotte Rendle     | - Chamberlain's Department |
| Samantha Kay         | - Chamberlain's Department |
| Aga Watt             | - Chamberlain's Department |
| Christopher Bell     | - City of London Police    |
| Gary Brailsford-Hart | - City of London Police    |
| Melissa Richardson   | - Town Clerk's Department  |
| Kate Doidge          | - Town Clerk's Department  |

### 1. APOLOGIES

Apologies were received from Ian Bishop-Laggett, Caroline Haines, Alderman Sir William Russell, and Deputy James Thomson.

Ian Bishop-Laggett and Deputy James Thomson observed the meeting virtually.

### 2. MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA

There were no declarations.

### 3. MINUTES

A Member raised that at the previous meeting, it had been noted that approval of the Generative AI Standard Operating Procedure had been delayed owing to waiting for review from the Independent Data Ethics Advisory Council. It was agreed that this would be captured under Item 6 of the public minutes and non-public summary of the previous meeting.

RESOLVED - That the public minutes and non-public summary of the meeting held on 13<sup>th</sup> May 2024 be approved as an accurate record, as amended above.

Under matters arising, the Committee heard that the Independent Data Ethics Advisory Council had met and reviewed the Generative AI Standard Operating Procedure in June 2024. It was anticipated that this would be published shortly, and a copy would be emailed to Members of the Committee.

4. **PUBLIC SWITCHED TELEPHONE NETWORK (PSTN) REPLACEMENT**

The Committee received a report of the Chamberlain, concerning approval for a project to engage with a third party to conduct an audit of the Public Switched Telephone Network (PSTN), to identify necessary actions and costs relating to the transition to an Internet Protocol (IP).

The Committee heard that any City Corporation operational property, including housing offices, was in scope for the project. The audit would remove all unrequired lines or connections and be able to better track the connections. It was explained that a metallic path facility (MPF) was a type of cable which provided an additional three years to transition to an IP.

Owing to the complexity of the network and the number of connections and sites, a physical audit was required which was time consuming, which provided explanation for the cost of the project. There would be a competitive tender for the third party.

It was queried what the backup would be for the digital IP. The response was that it would depend on the solution on a case-by-case basis. The member emphasised the need for redundancy and that this must be in scope for the project.

RESOLVED – That the Digital Services Committee:

- Approve the budget of £200,000 for the appointment of a consultant to reach the next Gateway, subject to the release of funds by Resource Allocation Sub Committee, Policy and Resources Committee, and the City Bridge Foundation Board (CBF).
- Note the total estimated cost of the project is subject to an audit of our current state.
- Note that an indicative amount of £2.5m has been put forward under the City's Capital and Supplementary Revenue (SRP).
- That a Costed Risk Provision of £50,000 is approved up to the next Gateway as detailed in the Risk Register in Appendix 2.

5. **REVENUE OUTTURN 2023-24**

The Committee received a report of the Chamberlain, concerning the revenue outturn for 2023/24 for the Digital Services Committee.

RESOLVED – That Members note:

- (a) the revenue outturn for 2023/24; and
- (b) the agreed central risk budget carry forwards into 2024/25, amounting to £97,000

6. **DIGITAL, INFORMATION AND TECHNOLOGY SERVICE (DITS) REDESIGN UPDATE**

The Committee received a report of the Chamberlain, concerning an update to the Digital, Information and Technology Service (DITS) following the co-design sessions and the changes to the DITS Senior Leadership Team, the commitment to look at the whole of the DITS following the recruitment of the Assistant Director roles, and the approval of the Digital, Data, and Technology Strategy.

RESOLVED – That the report be received, and its contents noted.

7. **DIGITAL, INFORMATION AND TECHNOLOGY SERVICE (DITS) - SERVICE DELIVERY SUMMARY**

The Committee received a report of the Chamberlain, concerning the service delivery summary for the Digital, Information and Technology Service (DITS).

A member of the Committee referenced the twice weekly “scrums” in the report. It was explained that these were a regular review mechanism for City of London and City of London Police which involved representatives for resolve groups. This looked at queue management, ensuring that work was up to date, and to report on any outstanding tickets.

It was explained that service metrics in Appendix 1 were like-for-like against the metrics used for Agilysys, measured using auto-responses. There would be further work to propose new metrics to reflect the work undertaken with regards to in-house incident performance for the City of London and City of London Police.

RESOLVED – That the report be received, and its contents noted.

8. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE SUB COMMITTEE**

There were no questions.

9. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT**

There were no items of urgent business.

10. **EXCLUSION OF THE PUBLIC**

RESOLVED - That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting for the following items on the grounds that they involve the likely disclosure of exempt information as defined in Part I of the Schedule 12A of the Local Government Act.

11. **NON-PUBLIC MINUTES**

RESOLVED – that the non-public minutes of the meeting held on 13<sup>th</sup> May 2024 be approved as a correct record.

12. **END USER DEVICES - REFRESH CONTRACT**  
The Committee received a report of the Chamberlain, concerning approval to endorse the contract for the provision of End User Devices, for onward approval at the Court of Common Council
13. **CROSS-CORPORATION CYBER SECURITY STANDARDS**  
The Committee received a report of the Chief Information Security Officer, concerning an overview of the method process to provide a baseline approach for the introduction of the NCSC Cyber Assurance Framework across the City of London and its Institutional departments.
14. **CYBER SECURITY UPDATE**  
The Committee received a report of the Chief Information Security Officer, concerning an update on cyber security.
15. **NON-PUBLIC QUESTIONS ON MATTERS RELATING TO THE WORK OF THE SUB COMMITTEE**  
There were no non-public questions.
16. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE SUB COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**  
Two items of non-public urgent business were raised.

**The meeting ended at 3.15 pm**

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Chairman

**Contact Officer: Kate Doidge**  
**Kate.Doidge@cityoflondon.gov.uk**



|  |   |
|--|---|
| <b>Committee(s):</b><br>Digital Services Committee – <i>For Information</i><br><br>Communications and Corporate Affairs Sub Committee – <i>For Information</i><br><br>Policy and Resources Committee | <b>Dated:</b><br>5 <sup>th</sup> September 2024<br><br>TBC<br><br>26 <sup>th</sup> September 2024 |
| <b>Subject:</b> Data Lighthouse Project Update   | <b>Public</b>   |
| <b>Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly?</b>  | Providing Excellent Services  |
| <b>Does this proposal require extra revenue and/or capital spending?</b>   | No  |
| <b>If so, how much?</b>  | N/A   |
| <b>What is the source of Funding?</b>  | N/A   |
| <b>Has this Funding Source been agreed with the Chamberlain’s Department?</b>  | N/A   |
| <b>Report of:</b> Chamberlain’s, Caroline Al-Beyerty   | <b>For Information</b>  |
| <b>Report author:</b> Sam Collins, Chamberlain’s   |   |

## Summary

This paper provides an update on the Data Lighthouse Project and the successful proof of concept exercise which concluded in July 2024. The findings of the proof of concept will be used to inform the business case to secure long-term funding for Microsoft Dynamics 365 Customer Insights, including the introduction of technical and functional roles to support the platform. There is sufficient capacity and funding in place to progress with a limited pilot in the interim.

## Recommendation

Members are asked to:

- Note the report.

## Main Report

### Background

1. In April 2023 the Digital, Information and Technology Service (DITS) initiated a Data Maturity Assessment for the City of London Corporation. The assessment was supported by Hitachi Solutions and consisted of 16 separate workshops covering various data related topics including data governance, data quality, data architecture and data security. There were over 40 participants from across the City of London Corporation.

2. The findings from the Data Maturity Assessment were presented to Digital Services Committee in July 2023 and included immediate, intermediate and strategic recommendations. One of the immediate recommendations was the initiation of a 'Data Lighthouse Project' to demonstrate best practices and the 'art of the possible with data'.
3. The management of customer data and the requirement for a Corporate Customer Relationship Management (CRM) system was identified as a key priority for the organisation and was chosen as the focus for the Data Lighthouse Project.

### **Current Position**

4. A proof-of-concept exercise exploring the use of Microsoft Dynamics 365 Customer Insights has now been completed. During the exercise DITS worked closely with departments to understand the functionality in greater detail and demonstrations were provided on the two elements of Customer Insights; the underlying data integration layer called 'Data', and the marketing layer called 'Journey'.
5. As part of the proof of concept exercise the following outcomes were achieved.
  - **Data integration** – customer data was imported from multiple sources, de-duplicated and merged to create unified 'customer records. The data integration included a live connection with the Strategic Engagement and Events Management (SEEMS) database.
  - **Single view of the customer** – the customer records showed a unified view of customer interactions including communications, activities and events.
  - **Customer segmentation** – customer segments were created based on activities or attributes held within the customer records and used to target digital communications activity.
  - **Communications** – branded communication templates including digital communications and sign-up forms were created and demonstrated.
  - **Journeys** – end to end marketing journeys were created and demonstrated including aspects such as reminders and confirmation e-mails.
  - **Analysis** – insights were provided at the platform, campaign and customer level, providing intelligence on customer interactions and engagement levels.
6. The demonstrations and proof of concept exercise received positive feedback from all stakeholders involved and Customer Insights was evaluated to be able to meet the requirements of the City of London Corporation. As such, the findings of the proof of concept will be used to develop the business case to secure longer term funding covering the product licence and the introduction of technical and functional support roles.

### **Proposal**

7. In the interim, there is sufficient capacity and funding to progress with a pilot exercise which would include the implementation of Customer Insights for a single service area. While the pilot would only allow for one service area to use the platform 'in anger', the intention would be that Customer Insights is configured to meet the requirements of the wider organisation. This would include integration

with key data sets, establishing rules for the merging of customer records, implementation of best practice for legislative requirements such as GDPR and agreement on corporate branding and standards. This would be with a view to making the platform more widely in 2025, subject to funding.

8. Whilst the initial focus of this project will be on the technical configuration of the Customer Insights platform, the success of the platform longer term will be judged on the level of adoption across the organisation and the use of the platform to deliver a more cohesive, standardised and impactful approach to communications and engagement for the City of London Corporation.

### **Key Data**

9. The Data Lighthouse Project commenced in November 2023 and included a sample of 7 different areas of the City of London Corporation.
10. The Project analysed 81,000 customer records and found that 45% of the data was duplicated across two or more of the areas within the project.
11. A Proof of Concept for Microsoft Dynamics 365 Customer Insights was completed in July 2024.
12. The long-term funding required for the use of Customer Insights including the initial licensing of the platform and the addition of functional and technical support roles, is estimated at around £186k per annum.

### **Corporate & Strategic Implications**

**Strategic implications** – The efficient and effective management of customer data and a better understanding of customer interactions across the City of London Corporation would help to support the successful delivery of the new Corporate Plan 2024-29, supported by the new Digital, Data and Technology Strategy. A well- managed Corporate CRM is a necessity for any large organisation, offering significant opportunities to collaborate more effectively across services, support cross functional working removing any duplication and provide better understanding and insight into the organisation's stakeholders.

**Financial implications** – There is funding in place for the pilot, however the findings of the proof of concept will support the development of the business case to either repurpose or secure future funding. The ongoing licensing and internal support costs are estimated to start from £250k per annum.

**Resource implications** – For the Corporate CRM, consideration should be given to the future support model which is likely to require 2-3 additional roles to provide functional and technical support. The proof of concept will determine whether existing resources can be repurposed and presented within the business case.

**Legal implications** – The proposed Corporate CRM would support compliance with the Data Protection Act 2018 in seeking and recording consent from customers to store their data and ensuring compliant retention periods for customer data.

**Risk implications** – There is an ongoing risk that customer data is not being managed effectively, or consistently in compliance with the requirements of the Data Protection Act 2018.

**Equalities implications** – It is not considered that the proposed Corporate CRM would have any equalities implications, however an Equalities Impact Assessment will be conducted to ensure that any impacts are considered.

**Climate implications** - None

**Security implications** - None

## **Conclusion**

13. This paper provides a summary of outcomes from the Microsoft Dynamics 365 Customer Insights proof of concept, which will be used to develop the business case for future funding. In the interim, the project will be progressed through a limited pilot, which will utilise existing capacity and funding.

## **Appendices**

- Appendix 1 – Presentation – Data Lighthouse Project Proof of Concept

## **Background Papers**

None

## **Sam Collins**

Assistant Director Digital and Data  
Digital, Information and Technology Service, Chamberlain's

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# Data Lighthouse Project

Microsoft Dynamics 365 Customer Insights POC



# Data Lighthouse Project - Observations

- Multiple disconnected tools and applications in use holding customer data
- Significant amount of manual, time consuming tasks
- Lack of co-ordination in marketing and events activity
- No single view of customer interactions
- Concerns around compliance with GDPR principles

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# Data Lighthouse Project – Proof of Concept

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The Data Lighthouse Project follows the Data Maturity work that was completed in partnership with Hitachi Solutions last year.

The project focussed on Customer data across a sample of COL Services to understand how it is being stored, managed and used. Supports the case for a Corporate CRM tool.

Proof of Concept to understand the capabilities of Microsoft Dynamics 365 Customer Insights, its ability to meet the needs of COL and support the development of the business case.

Two elements to Customer Insights – ‘Data’ and ‘Journeys’.

## Customer Insights – Data

- Customer data brought in from multiple sources, including a live connection to SEEMS
- Data is matched and deduplicated to create unified Customer Records
- Customer Records can be ‘enriched’ by external data sources

City of London Corporation Customer Insights - Data

You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, [contact sales](#). Create environment

### Unify

Use enriched tables View last run Custom

Define matching rules

Define rules to match customer records between two or more tables. Set the order of each table based on priority, and select + Add rule to get started. [Learn about matching rules](#)

| Order      | Name                              | Source records | Unique records | Records matched | Include all records                 |
|------------|-----------------------------------|----------------|----------------|-----------------|-------------------------------------|
| 1          | Residents : GovernmentSystem      | 1,000,000      | 1,000,006      |                 | <input checked="" type="checkbox"/> |
| 2          | SurveyResidents : SurveySystem    | 749,865        | 748,648        | 80.4% matched   | <input checked="" type="checkbox"/> |
| Name+Email |                                   |                |                | 80.4%           |                                     |
| + Add rule |                                   |                |                |                 |                                     |
| 3          | RemedyResidents : TicketingSystem | 753,237        | 753,030        | 80.4% matched   | <input checked="" type="checkbox"/> |
| Name+Email |                                   |                |                | 80.4%           |                                     |
| + Add rule |                                   |                |                |                 |                                     |

2.5M Unique source records 1.29M Matched and non-matched records 822.6K Matched records only

Back Next Save and close Cancel



City of London Corporation Customer Insights - Data

Home Customers Data Insights Settings

You're viewing sample data. Customize what you see by connecting to your own data. For licensing options, [contact sales](#). Create environment

Back to Customers Profile add-ons

**Lewiss Cremen**  
Seattle, Washington, United States  
Last activity: 02/12/2019, 09:03 (UTC)

Customerid: 000036a2f1c8a5e8e274b83f0f614509

Gender: Male

DOB: 26/05/1999

Phone: 915-630-8021

Emailid: lcremenaks@liveinternet.ru

Address: 616 Melvin Center, Seattle, Washington 98114 United States

**Additional fields**

SSN: 325-80-4011

Individual: Family

HouseholdIncome: 132,934

RegisteredVoter: No

Customer\_Modified...: 29/10/2022, 10:20 (UTC)

**Ids**

GovernmentSystem: Residents  
ResidentID: 3DAC1B9F-470E-4DBE-BC2E-276FC2A882D2  
ResidentID\_Altern...: 3DAC1B9F-470E-4DBE-BC2E-276FC2A882D2

SurveySystem: SurveyResidents  
SurveyContactID: 04E4405F-4DE8-4B8E-852C-4171DE9EED21  
SurveyContactID\_...: 04E4405F-4DE8-4B8E-852C-4171DE9EED21

TicketingSystem: RemedyResidents

**Activity timeline**

5 Activity 1 Surveys 1 Tickets

DEC 2019 (1)

- Phone Call Activity - 02/12/2019, 09:03 (UTC)  
Call related to billing

JUN 2019 (1)

- Ticket - 04/06/2019, 15:20 (UTC)  
Review ticket submitted

APR 2019 (1)

- Phone Call Activity - 15/04/2019, 10:59 (UTC)  
Call related to billing

MAR 2019 (1)

- Survey - 29/03/2019, 13:47 (UTC)  
Survey response received

MAR 2018 (2)

- Email Activity - 23/03/2018, 17:26 (UTC)  
Email related to billing
- Phone Call Activity - 01/03/2018, 21:23 (UTC)  
Call in regards to court date

SEP 2017 (1)

- Phone Call Activity - 04/09/2017, 12:37 (UTC)  
Call in regards to court date

**Avg time to resolve incidents**  
Last updated 2 years ago  
2

**Avg survey score**  
Last updated 2 years ago  
6

**Interest SoV for customers like Lewiss Cremen**

|                |     |
|----------------|-----|
| Government...  | 10% |
| Government...  | 10% |
| Community...   | 65% |
| State & Loc... | 10% |
| Government...  | 10% |

**Brand Sov for customers like Lewiss Cremen**

|                 |     |
|-----------------|-----|
| Centers for ... | 10% |
| Amtrak          | 10% |
| Small Busin...  | 10% |
| United Stat...  | 55% |
| Federal Co...   | 10% |

## Customer Insights – Data

- A Unified Customer Record shows all interactions across multiple services
- Activities are all provided in a single timeline
- Interests are included on the Customer Record, as well as recommendations for other areas of interest

# Customer Insights – Data

- Customer Segments are used to target customer groups
- Segments can be created based on activity or attributes held within their customer record
- Segments can be static or dynamically updated based on certain criteria

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The screenshot displays the Microsoft Customer Insights interface. The left sidebar contains navigation options: Home, Customers, Data, Insights, Segments (selected), Measures, Predictions, Custom models, Reports (Preview), and Settings. The main content area is titled 'Segments' and shows 'Activity-based segment suggestions' and 'Attribute-based segment suggestions'. The activity-based suggestions include 'High Recency' (74.4K members, 606 days average), 'Medium Recency' (90.5K members, 658 days average), and 'Low Recency' (72.7K members, 789 days average). The attribute-based suggestions include '42% of customers in this suggestion have ChurnRisk = 7 as compared to 36% across all customers' (43.2K members), '41% of customers in this suggestion have ChurnRisk = 7 as compared to 36% across all customers' (4.7K members), and '37% of customers in this suggestion have ChurnRisk = 6 as compared to 35% across all customers' (45.5K members). Each suggestion card includes a 'See suggestion' link and a 'Create segment' button.

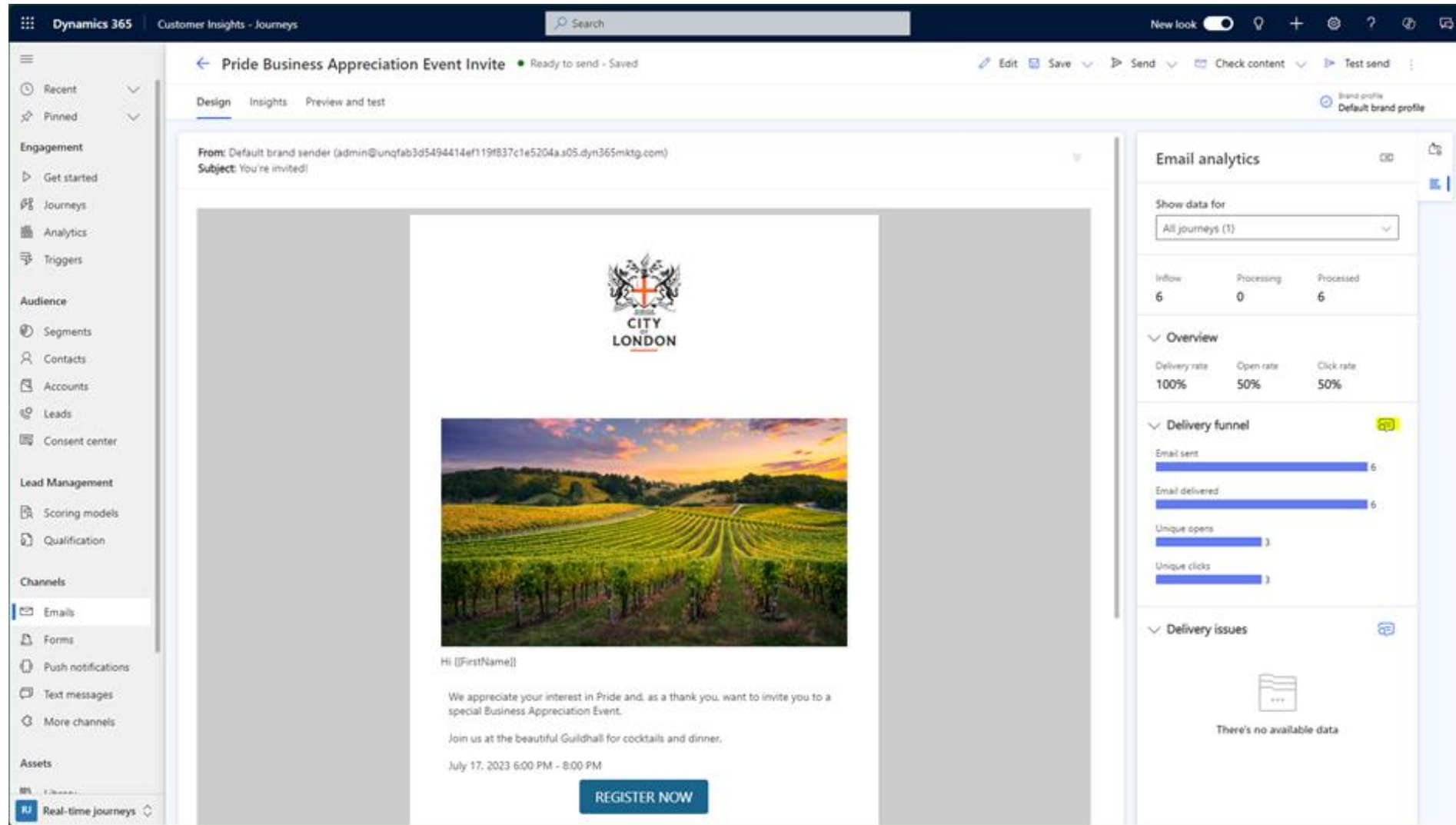
# Customer Insights – Journeys

- Branded e-mail templates can be configured to ensure consistent look and feel

- All e-mails can be previewed and tested

- Accessibility checking built into the Customer Insights

- Spam score also available



Dynamics 365 Customer Insights - Journeys

IG Marketing • Live - Saved

Design | Preview and test | Submissions

The screenshot displays the Dynamics 365 Customer Insights Journeys interface. The main area shows a form design for 'THE GLOBAL CITY' with the following fields: Email Address, First Name, Last Name, Company Name, and Where did you hear about us? The form is styled with a blue and white theme. On the right, the 'Form analytics' panel shows a conversion rate of 50%, 3 submissions, and 6 views. Below this, a 'Submission funnel' chart shows 4 form views, 3 submissions (75%), and 3 unique submissions (75%).

Form analytics

50% Conversion rate | 3 Submissions | 6 Views

Submission funnel

Form views: 4 (100%)  
 Submissions: 3 (75%)  
 Unique submission: 3 (75%)

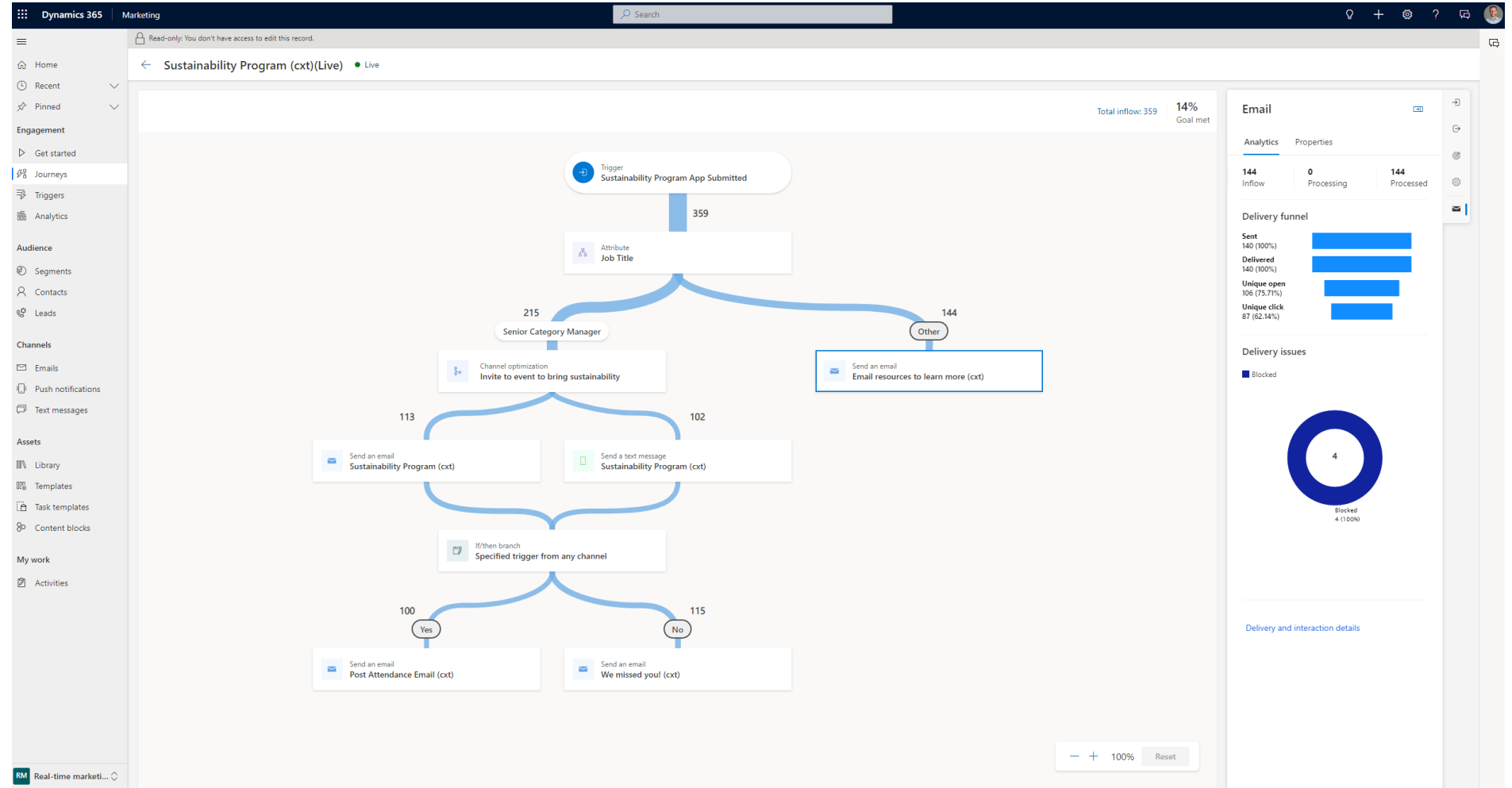
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## Customer Insights – Journeys

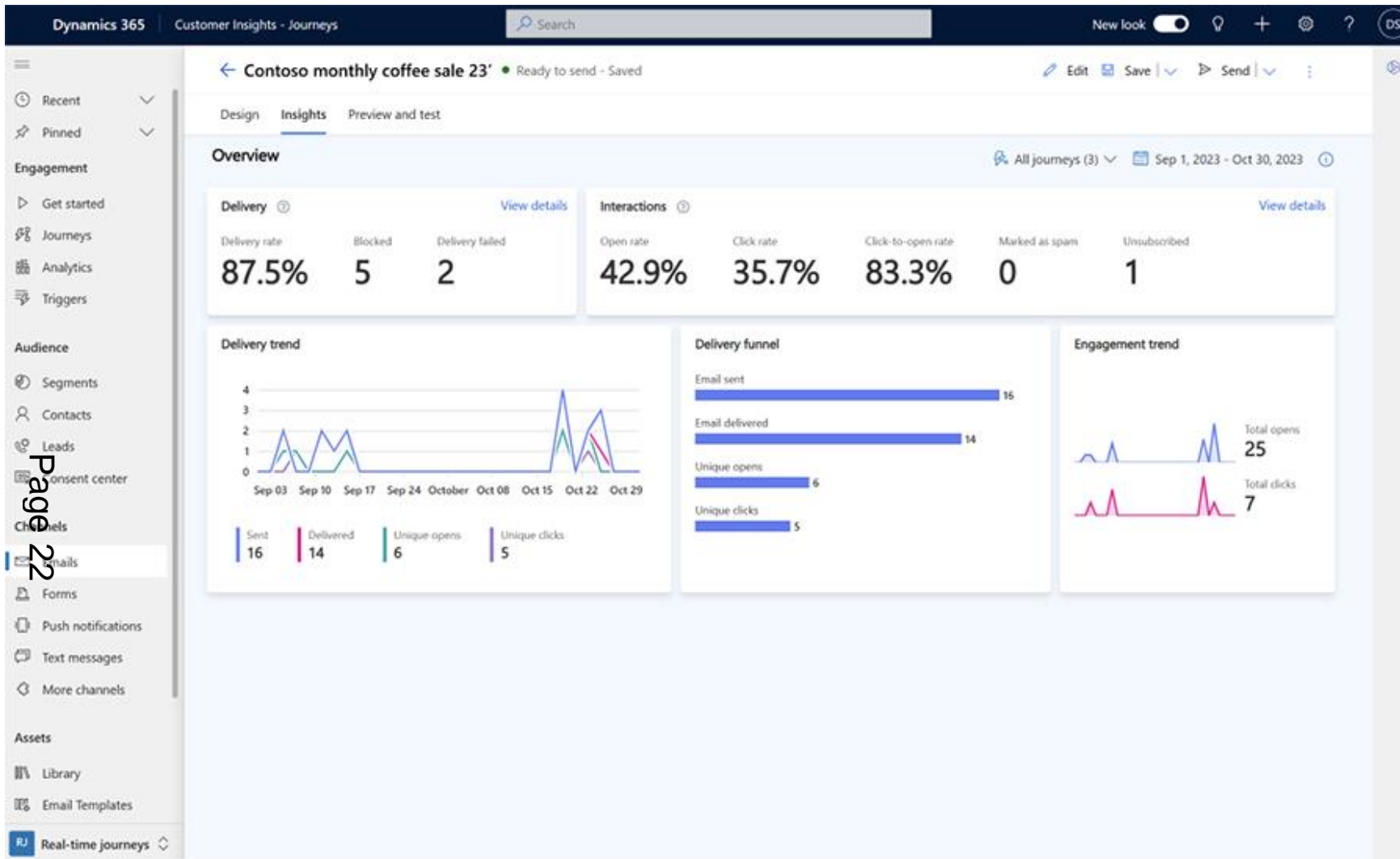
- Forms are available for customers to sign up for marketing or events
- Branding is fully configurable, with different templates available based on the area of interaction

# Customer Insights – Journeys

- ‘Journeys’ can be configured based on certain criteria or customer behaviour
- e.g. if a customer registers for an event, then joining instructions can be automatically sent. If a customer fails to register for an event then they receive a reminder instead.
- Messaging can also be tailored based on responses



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## Customer Insights – Journeys

- Detailed analysis is available for every e-mail or form sent including delivery rate, open rate and click rate

# Customer Insights – Journeys

- Detailed insights are also available on a Customer's Record

- Emails received, opened

Forms completed

Events attended

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The screenshot displays the Dynamics 365 Marketing interface for a customer record. The top navigation bar includes 'Dynamics 365 | Marketing', a search bar, and various utility icons. The left sidebar contains navigation options like 'Recent', 'Pinned', 'Engagement', 'Audience', 'Channels', and 'Assets'. The main content area is titled 'Jeannette Nielsen - saved Contact' and shows the 'Insights' tab selected. Below this, there are tabs for 'Real-time marketing' and 'Outbound marketing'. The 'Overview' section provides a summary of engagement metrics for the period 'Jan 22 2022 - Feb 22 2022'. The 'Channel engagement' section uses horizontal bars to show: Emails opened (25), Emails clicked (20), Forms visited (12), Forms submitted (4), Text link clicked (14), Text message replied (8), Push notifications opened (9), Push notifications link clicked (5), and Custom channel clicked (5). The 'Email' section shows 25 total opens, a 46% open rate, and 7 delivery issues. The 'Form' section shows 4 submissions. The 'Text message' section shows 14 total clicks and 7 delivery issues. The 'Push notification' section shows 9 opens, a 56% open rate, and 8 not sent. The 'Custom channels' section shows 5 total clicks and 2 delivery issues. Each section includes a 'View insights' link.

# Customer Insights – Journeys

- Event Management function to support event marketing and registrations
- Events can be in person or virtual using Teams
- Check in App also available
- Additional functionality includes agendas, speaker biogs, session planning with all event info hosted on the platform

The screenshot displays the Dynamics 365 Customer Insights Journeys interface for an event titled "Sailesh - Pride Event". The interface is divided into several sections:

- Navigation:** A left-hand sidebar contains various menu items such as "Recent", "Pinned", "Event", "Event Registrations", "Event Team Members", "Participants", "Speakers", "Check-ins", "Venue management", "Logistics", and "Sponsorship management".
- Event Overview:** The main header shows the event name "Sailesh - Pride Event" and its status as "Active for 7 days". A progress bar indicates the current stage is "Preliminaries (7 D)", with other stages like "Agenda", "Organize", "Promote", "Launch", and "Post Event" visible.
- Key Information:** A section containing fields for "Event name" (Sailesh - Pride Event), "Event type" (Executive briefing), "Registration count" (1), "Check-in count" (1), and "Event URL".
- Schedule:** A section containing fields for "Event time zone" (GMT+00:00 Dublin, Edinburgh, Lisbon, London), "Event start date" (10/07/2024, 09:31), "Event end date" (10/07/2024, 11:31), and "Countdown in days" (0).
- Stream this event online:** A section with a toggle switch for "Do you want to stream this event?" (set to "No") and a notification for "Microsoft Teams is available as a streaming channel".
- Location:** A section with dropdown menus for "Building" (Guildhall), "Room" (Great Hall), and "Layout" (Round Tables).
- Venue constraints:** A section with a field for "Maximum event capacity" (628).

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# Conclusion

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Single view of the Customer

Shared customer data across multiple services

Oversight of all digital marketing activity and events

Approved branding and templates

Analysis of engagement levels and impact



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|  |   |
|--|---|
| <b>Committee(s):</b><br>Digital Services Committee – <i>For Information</i><br>Corporate Services Committee – <i>For Information</i><br>Finance Committee – <i>For Information</i> | <b>Dated:</b><br>5 <sup>th</sup> September 2024<br>11 <sup>th</sup> September 2024<br>24 <sup>th</sup> September 2024 |
| <b>Subject:</b> Enterprise Resource Planning (ERP) Programme Update Report   | <b>Public</b>   |
| <b>Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly?</b>  | Providing Excellent Services  |
| <b>Does this proposal require extra revenue and/or capital spending?</b>   | N   |
| <b>If so, how much?</b>  | N/A   |
| <b>What is the source of Funding?</b>  | N/A   |
| <b>Has this Funding Source been agreed with the Chamberlain’s Department?</b>  | N/A   |
| <b>Report of:</b> Chief People Officer & The Chamberlain<br><b>Report author:</b> Simon Gray, Chamberlain’s Department   | <b>For Information</b>  |

## Summary

This report updates the advancements in the Enterprise Resource Planning (ERP) Programme.

The City of London Corporation is undertaking a major project to transform its systems with an ERP solution, which will take over the duties from the current legacy systems; namely City People (Midland i-Trent) for HR & Payroll, and Oracle R12 for strategic as well as operational finance functions. This new ERP system will update and improve the technology used to provide our essential behind-the-scenes services.

The ERP Programme has achieved significant milestones in the last 3 months including the completion of the procurement exercise for the System Integrator Partner, recruited to HR roles within the programme team.

## Recommendation(s)

Members are asked to note the report.

## Main Report

### Background

1. The City of London Corporation has embarked on implementing an Enterprise Resourcing Planning (ERP) System that will replace the ageing Finance, HR, Payroll and Procurement systems.
2. The same core back-office systems have been utilised for over 20 years. The systems are now either out of support (Oracle) or an unsupported platform (City

People) which causes the City of Corporation the need to procure third-party support and invest staff time in prolonging their life to deliver critical services.

### **System Integrator (SI) Procurement Update**

3. The Initiation to Tender (ITT) phase of the SI procurement was published in April to the eligible suppliers, with a submission deadline of the of May 2024. Throughout June, 38 officers undertook the evaluation process of the responses of three bidders. Following moderation of individual scores, interviews with suppliers were carried out to finalise the scores for each supplier's bid. The outcome of the procurement process was then presented to the Project Board, Member Steering Group, Digital Services Committee and Court of Common Council for approval.
4. Following the approval of the preferred bidder status of Bidder B, the suppliers have been notified and following the standstill period, final contract negotiations will be conducted throughout August with an anticipated contract start date of Early September.

### **Programme Update**

5. The project aims to finish the agreed scope by April 2026. Human Resources (HR) will be implemented in phases, starting with Recruitment and Performance Management, while Finance is scheduled for a single deployment. This plan will proceed upon endorsement by the chosen System Integrator.
6. The programme is focused on the readiness checks prior to the commencement of the programme with the SI partner. Readiness checks include:
  - i. Programme resourcing (see HR and Finance sections) and external recruitment for specialist skills
  - ii. Appointing a partner to perform a data health check
  - iii. Establishing the change strategy
  - iv. Launching early programme comms to prepare the organisation
7. In preparation of the onboarding on the System Integration partner in September, key stakeholders in the programme are participating in the rebranding initiative for the programme. The goal is to infuse new energy into the project and foster greater engagement by choosing a name that resonates and captures the essence of our mission. Results of the re-naming and rebranding of the programme will be presented to the project board in September for approval.

### **HR Update**

8. The terms of reference and membership of the HR Project Board have been agreed and regular meetings have commenced.
9. Over the summer an internal recruitment campaign for HR programme roles was conducted. Seven candidates have been appointed to roles and HR Architect was appointed to by an external applicant. Two roles remain vacant, with a plan in place is to readvertise the roles internally and/or externally. Following the internal

appointments, conversations on backfill requirements are ongoing to ensure delivery of business as usual responsibilities.

### **Finance Team Update**

10. The position of Finance Architect has been assigned to, with all higher-level finance positions reporting to the Finance Lead. In contrast to the HR roles, the majority of the finance positions have been earmarked by current post holders who will pivot into the program.

### **Technical Team Update**

11. The fundamental technical team is assembled and prepared to start work on the program. Recruitment for the other positions that demand additional SAP technical expertise will be open to both internal and external applicants to ensure we recruit the most qualified individuals for the program.

### **Budget Update**

12. The Digital Services Committee, serving as the Lead Committee in alliance with the Finance Committee, has established a robust framework to ensure diligent monitoring and to affirm that controls over the cost risk provision within the budget. It is recommended that the Chamberlain, as the project SRO has authority to approve the utilisation of up to 10% of the costed risk provision, with the use of above this threshold will require scrutiny by Digital Services Committee and the approval of Finance Committee.

### **Programme Next Steps**

13. We are currently reviewing the options for programme office location to enable co-location of the programme team and the system integrator.

14. The programme plan will be co-developed with the SI as there are some phasing discussions to be agreed.

15. The change and communications strategies to engage with staff are currently being developed and will be presented to the programme board in the Autumn.

### **Corporate & Strategic Implications**

**Strategic implications** - The ERP Programme supports the Corporate Initiatives to deliver brilliant basics and mitigates the risk of unsupported legacy systems.

**Financial implications** – Digital Services Committee, Finance Committee and Court of Common Council have approved the budget envelope to bring in the relevant resources including backfills.

**Resource implications** - The requirement of resourcing is detailed in this paper.

**Legal implications** - All staff resourcing, and employment contracts will comply with statutory requirements and be in line with best practice.

**Risk implications** - Failure to baseline the programme roles would place a risk on the organisation.

**Equalities implications** - An Equalities Impact Assessment was done initially and is currently being updated and will be brought back for review. This will be routinely updated throughout the life of the programme.

**Climate implications** - None

**Security implications** - None (other than standard vetting requirements)

## **Conclusion**

The last quarter saw notable advancements in the rollout of the new Enterprise Resource Planning (ERP) system, set to supersede the existing systems for Finance, HR, Payroll, and Procurement. Selection of the System Integrator Partner is finalised, with the project aiming to conclude its planned scope by April 2026. The team is now focusing efforts on preparation tasks, such as staffing, data verification, change planning, and initial programme announcements. Members should acknowledge this report.

### **Simon Gray**

ERP Programme Manager

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# Agenda Item 6

|   |   |
|---|---|
| <b>Committee(s)</b><br>Digital Services Committee   | <b>Dated:</b><br>5 <sup>th</sup> September 2024 |
| <b>Subject:</b><br>Digital, Information and Technology Service (DITS) –<br>Service Delivery Summary       | <b>Public</b>                                   |
| <b>Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly?</b> | Providing Excellent Services                    |
| <b>Does this proposal require extra revenue and/or capital spending?</b>                                  | No  |
| <b>If so, how much?</b>   | N/A   |
| <b>What is the source of Funding?</b>   | N/A   |
| <b>Has this Funding Source been agreed with the Chamberlain’s Department?</b>                             | N/A   |
| <b>Report of:</b><br>The Chamberlain  | <b>For Information</b>                          |
| <b>Report author:</b><br>Dawn Polain – Service Delivery Manager, CoL/CoLP                                 |   |

## Summary

This is an overview of the current service provision as managed by DITS.

Performance is measured monthly therefore for the purposes of this report, the most recent reporting month is July 2024.

The services managed by DITS for the City of London Corporation (CoL) and City of London Police (CoLP) have been stable.

Customer Satisfaction levels remain high at 73% of CoL and CoLP employees providing a score of 8 or above.

## Recommendation(s)

Members are asked to note the report.

### Main Report

#### Current Position

1. There were no CoL or CoLP P1 Incidents reported for July which were within the support responsibility of DITS Resolver teams.

#### Key service provider status:

2. Roc had no P1 incidents closed in July.

3. British Telecom (BT) reported 1 P1 incident in July which affected the Cemetery and Crematorium. The outage lasted approximately 36 minutes, but no fault was found during the investigation, and then service resumed. At the time of writing, discussion is ongoing with BT into the root cause.

### **Service improvements and highlights**

4. The Service Management team are reviewing our Configuration Management Database (CMDB) service metrics to provide enhanced assurance around data integrity and completeness.
5. The Change Management team are working with Resolvers to ensure that any change to the CoL or CoLP Infrastructure is reviewed and considered for approval at the Change Advisory Board. This has resulted in an increase in the numbers of Changes logged for July.
6. The Service Management team are reviewing all Resolver Groups in ServiceTeam to ensure that Group members remain valid and correct.

### **Service Metrics**

7. The Service Management team are continuing to review all P1 and P2 calls logged to ensure that they have been given the correct priority during initial triage. The team are also ensuring that only calls which fall within the responsibility of DITS Resolvers are reported in the monthly performance metrics. As a result of this pro-activity, the team have been able to report zero P1 and P2 calls for CoL in July, and zero P1 calls for CoLP.
8. The CoL P4 Resolution KPI has been achieved consistently for the past 6 months.  
The CoLP P4 Resolution KPI has been achieved for the past 4 months.
9. The CoLP Standard Service Request KPI was achieved in July (92%) and the CoLP Starter Mover Leaver KPI achieved 100% for the same reporting period.

### **Options**

10. None to advise this reporting period.

### **Proposals**

11. None to advise this reporting period.

### **Corporate and Strategic Implications**

12. None to advise this reporting period.

### **Conclusion**

13. DITS are committed to working in an environment of Continual Service Improvement. Potential improvements are consistently being identified and



implemented to ensure that our services meet the expectations and needs of our business.

## **Appendices**

- Appendix 1 - CoL and CoLP Performance Stats.

### **Dawn Polain**

CoL/CoLP Service Delivery Manager | Digital, Information and Technology (DITS)

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Appendix 1 – Current Performance against Service Metrics

COL/LC In House Incident Performance

Executive Performance Metrics | COL/LC In House

| CoL/LC                                 | KPI Metrics  | February 2024 |       | March 2024 |       | April 2024 |      | May 2024 |      | June 2024 |      | July 2024 |      |
|--|--|---------------|-------|------------|-------|------------|------|----------|------|-----------|------|-----------|------|
|  |  | Total         | KPI % | Total      | KPI % | Total      | KPI% | Total    | KPI% | Total     | KPI% | Total     | KPI% |
| Service Performance Measure (In House) | Total Incidents (Logged)                           | 719           | -     | 816        | -     | 695        | -    | 569      | -    | 586       | -    | 636       | -    |
|  | Total Incidents (Closed)                           | 726           | -     | 842        | -     | 743        | -    | 563      | -    | 540       | -    | 674       | -    |
|  | 98% of all P1 Incidents responded < 15 minutes     | 0             | -     | 0          | -     | 0          | -    | 0        | -    | 0         | -    | 0         | -    |
|  | 98% of all P2 incidents responded to < 15 minutes  | 6             | 33%   | 10         | 40%   | 10         | 10%  | 3        | 33%  | 1         | 100% | 0         | -    |
|  | 95% of all P3 incidents responded to < 2 hours     | 130           | 52%   | 226        | 79%   | 171        | 74%  | 129      | 78%  | 145       | 76%  | 92        | 71%  |
|  | 95% of all P4 incidents responded to < 8 hours     | 590           | 87%   | 606        | 95%   | 562        | 96%  | 431      | 94%  | 393       | 96%  | 582       | 95%  |
|  | 98% of all P1 Incidents resolved < 2 hours.        | 0             | -     | 0          | -     | 0          | -    | 0        | -    | 0         | -    | 0         | -    |
|  | 98% of all P2 Incidents resolved < 4 hours         | 6             | 50%   | 10         | 80%   | 10         | 60%  | 3        | 100% | 1         | 100% | 0         | -    |
|  | 90% of all P3 incidents resolved < 8 hours         | 130           | 68%   | 226        | 70%   | 171        | 76%  | 129      | 81%  | 145       | 87%  | 92        | 75%  |
|  | 90% of all P4 incidents resolved < 5 business days | 590           | 93%   | 606        | 94%   | 562        | 97%  | 431      | 94%  | 393       | 96%  | 582       | 97%  |

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CoLP In House Incident Performance

Executive Performance Metrics | COLP In House

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| COLP                                   | KPI Metrics  | February 2024 |       |   | March 2024 |       |   | April 2024 |       |   | May 2024 |       |   | Jun 2024 |       |   | July 2024 |       |   |
|--|--|---------------|-------|---|------------|-------|---|------------|-------|---|----------|-------|---|----------|-------|---|-----------|-------|---|
|  |  | Total         | KPI % |   | Total      | KPI % |   | Total      | KPI % |   | Total    | KPI % |   | Total    | KPI % |   | Total     | KPI % |   |
| Service Performance Measure (In House) | Total Incidents (Logged)                           | 731           | -     | - | 694        | -     | - | 818        | -     | - | 767      | -     | - | 832      | -     | - | 746       | -     | - |
|  | Total Incidents (Closed)                           | 867           | -     | - | 663        | -     | - | 890        | -     | - | 727      | -     | - | 834      | -     | - | 828       | -     | - |
|  | 98% of all P1 Incidents responded < 15 minutes     | 1             | 0%    | → | 5          | 0%    | → | 4          | 0%    | → | 1        | 0%    | → | 3        | 0%    | → | 0         | -     | ↑ |
|  | 98% of all P2 incidents responded to < 15 minutes  | 30            | 9%    | ↓ | 21         | 10%   | ↑ | 13         | 38%   | ↑ | 15       | 27%   | ↓ | 1        | 0%    | ↓ | 3         | 0%    | → |
|  | 95% of all P3 incidents responded to < 2 hours     | 151           | 38%   | ↑ | 160        | 39%   | ↑ | 217        | 53%   | ↑ | 180      | 61%   | ↑ | 221      | 56%   | ↓ | 74        | 32%   | ↓ |
|  | 95% of all P4 incidents responded to < 8 hours     | 151           | 74%   | ↑ | 476        | 75%   | ↑ | 656        | 83%   | ↑ | 531      | 86%   | ↑ | 609      | 88%   | ↑ | 751       | 86%   | ↓ |
|  | 98% of all P1 Incidents resolved < 2 hours.        | 1             | 0%    | → | 5          | 0%    | → | 4          | 50%   | ↑ | 1        | 0%    | ↓ | 3        | 0%    | → | 0         | -     | ↑ |
|  | 98% of all P2 Incidents resolved < 4 hours         | 18            | 45%   | ↑ | 21         | 57%   | ↑ | 13         | 69%   | ↑ | 15       | 67%   | ↓ | 1        | 0%    | ↓ | 3         | 33%   | ↑ |
|  | 90% of all P3 incidents resolved < 8 hours         | 120           | 51%   | ↑ | 160        | 46%   | ↓ | 217        | 71%   | ↑ | 180      | 74%   | ↑ | 221      | 81%   | ↑ | 74        | 54%   | ↓ |
|  | 90% of all P4 incidents resolved < 5 business days | 99            | 83%   | ↑ | 475        | 88%   | ↑ | 656        | 96%   | ↑ | 531      | 96%   | → | 609      | 97%   | ↑ | 751       | 97%   | → |



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