Committee(s)	Dated:
Public Relations and Economic Development Subcommittee	3 December 2019
Subject: Strategic stakeholder engagement supported by Customer Relationship Management Software	**Public**
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Summary

To support better targeting and coordination of the City Corporation's strategic engagement with political and business stakeholders, the City Corporation has implemented a new Customer Relationship Management (CRM) system bringing together Innovation and Growth, Remembrancer's, Mansion House, Corporate Affairs, and the Chair of Policy and Resources Office.

Now that this CRM platform is operational, this paper reports on progress and future opportunities for improving strategic engagement via CRM, along four dimensions:

- **Legal compliance**: Having a contact management system that enables data to be stored in a clean and well-managed way in line with the City Corporation's GDPR and legal responsibilities;
- **Shared intelligence**: Ensuring better coordinated planning, briefing, and capturing stakeholder intelligence holistically across different departments and forms of engagement;
- **Assessing and modifying approaches**: Analysing how successful different forms of engagement have been with individuals and organisations, and modifying accordingly; and
- **Active goal alignment**: Using the platform to ensure engagement is aligned with and supports strategic goals.

As the system develops, it will also support several efficiencies in ways of working, including automated systems for electronic registration and invitation of guests to events, automation of diary management, tracking and automated responses for campaigns and literature distribution and live reports in combination with public databases.

In addition, the paper notes how the Strategic Relationship Management (SRM) team in Innovation and Growth will improve the impact of external engagement, supported by the CRM system.

Recommendation(s)

Members are asked to note the report, which they had requested.

Main Report

Background

1. The City of London Corporation's previous approach to Customer Relationship Management (CRM) was ineffective, inefficient, and posed a significant risk to the City Corporation around data protection and GDPR. A new approach bringing together strategic engagement and events management from across Innovation & Growth, Corporate Affairs, Remembrancer's, Mansion House, and central support for the Chair of Policy and Resources onto a new and up to date IT platform supported by a new Business Intelligence Unit (BIU) was approved in May 2018.

2. In order to realise the above, the Public Relations and Economic Development Sub Committee and the Policy and Resources Committee approved the new approach to strategic engagement and events management; the Resource Allocation Sub Committee approved £110,000 funding as a permanent uplift in budget for the strengthened support team (2019/2020); the Finance Committee approved £185,000 of contingency funding for a transition team and the Business Intelligence Unit (2018/2019) and the Establishment Committee approved the necessary steps to undertake the changes in the structure in relation to human resource.

3. These associated costs approved by these committees were used for transition support and re-evaluation of associated staffing, following the division of roles from the previous central team between Electoral Services in support for the City Occupiers Database, and the new Business Intelligence Unit.

4. Innovation and Growth managed this process of change, working closely with IT to implement the technical solution, and across the departments coming onto the system to develop agreed joint ways of working and approaches to data management. A new team – the Business Intelligence Unit – commenced in March 2019. Housed in IG, it took on the responsibility for managing the system and working with users across departments.

5. The new system, based on Microsoft Dynamics and customised in-house, has been operational since July 2019, with 111 users licensed and trained to use this to manage their data records, upload briefings and meeting notes, and capture key information about stakeholders, such as their role, sector, industry, interests, and for political stakeholders, party and roles, constituency and majority.

6. Events management will also be fully integrated on the system by December 2019 with events teams in Mansion House and Remembrancer's able to use the system to plan events, with new functionality to send out and manage invitations, track responses and modify guest lists. The platform's ability to fully integrate table seating planning and reporting will be developed and finalised by February 2020.

7. The system is supported by IT, with Microsoft Dynamics now adopted as the platform for most CRM systems across the City Corporation. There is currently additional temporary development support through to March 2020 to complete the

new events functionality. After this, IT will provide the necessary support to ensure the software is kept up to date and functionality including migration to the new user interface that will allow access for mobile and tablet, automatic scanning of business cards, increased performance and interactive dashboards.

8. As part of the CRM development, we engaged with stakeholders including the CBI and the Law Society to understand industry best practice, while building in the new functionality offered by the latest Dynamics software and tools such as Google Analytics.

Current Position - CRM Benefits

9. The new system supports strategic engagement along four key dimensions, outlined below, while also offering operational efficiencies.

10. **Legal compliance**: A large scale data cleansing exercise was carried out to remove out of date, irrelevant, and duplicated records, reducing the number of records held from 372,000 to 22,000. New data retention and ownership policies have been introduced to ensure active management of records, and training undertaken with every individual using the system to ensure they are aware of their data protection responsibilities. GDPR self-assessment and automatic GDPR email notifications to new contacts have been built into the system. Collectively these measures are helping to ensure that the City Corporation's strategic engagement is GDPR compliant and server encryption measures mean that the information held is significantly more secure than previously.

11. **Shared intelligence:** For the first time, the City Corporation now has a joint system in place to enable contacts from across five departments to be shared. This means that users can see both previous and forthcoming engagements to help coordinate planning, and access previous briefing and meeting notes to ensure coordinated briefings and that meetings build on previous engagement without duplicating it. Work is ongoing to ensure all the LM and CPR's strategic engagements are logged on the system.

12. As the planned functionality of the system further develops, this means it will also be possible to track engagement holistically on an individual or organisation level across different engagement formats – for example to see what events they have attended or declined and which newsletters they receive, alongside more formal meetings, again helping to target and inform engagement better.

13. **Assessing and modifying approaches**: Bringing together and tracking different forms of engagement in this way will also enable the City Corporation to assess how effective different forms of engagement are proving to be – for example, if a specific invitee from a particular company never attended events then we could target different representatives, or ensure particular under-represented sectors are invited.

14. **Active goal alignment**: The new system enables information to be captured at an individual and firm level that will help to ensure proactive strategic alignment in different forms of engagement – for example, by tagging and capturing specific

interests or relevant fora, such as an interest in green finance, or Davos attendance.

15. In addition to the benefits in supporting strategic engagement, the system is supporting a number of **operational efficiencies** and new ways of working, current and planned. These include:
    - Full integration with Outlook and Microsoft Teams, both in desktop and mobile devices, operating with real time analysis of engagement by teams, sectors and industries in the system while allowing collaborative work with colleagues;
    - The use of integrated ClickDimensions for marketing purposes, including email, web forms and surveys; and
    - The ability to digitally register and process event guests, seating plans, and associated information such as dietary requirements, and produce tailored output reports for different uses such as caterers and security.

Strategic Relationship Management

16. The new CRM system provides the platform of intelligence and analysis to enable better strategic engagement. But there are also some changes needed to support how we collectively undertake account management and stakeholder engagement. To this end, following Innovation and Growth's restructure, a dedicated Strategic Relationship Management (SRM) team is being set up, and expected to be in place by end of January 2020.

17. Relationship management is effective, well-coordinated and sustained engagement with key external stakeholders – businesses, policy-makers and representative bodies. It is critical to the City Corporation role in ensuring the UK's financial and professional services offer is innovative and globally competitive. It helps to more easily share business intelligence and mobilise cross-departmental resources in support of our economic, trade, investment, civic, cultural, regulatory and wider policy objectives.

18. By knowing its partners and stakeholders better and systematically developing and maintaining relationships with them over the long term, we will have better understanding of each organisations' priorities and concerns and how these overlap with CoLC's aims and offer to them. This requires an effective and systematic approach to relationship management across the whole organisation.

19. The SRM team will provide dedicated capacity for relationship management of key accounts of businesses, government departments and trade associations. They will also provide strategic oversight and support of relationship management led by other teams in Innovation and Growth and ultimately other Corporation departments.

Next Steps in Developing Strategic Engagement Support

20. All the external engagement teams in Town Clerks, Remembrancers and Mansion House Departments now have fully trained users on the system and are starting

to systematically record information and intelligence both about stakeholders (such as their interests) and from them (eg from meetings).

21. A central record of the City Corporation's stakeholder management will be beneficial for political engagement and will allow Officers across the Corporation, but particularly in Remembrancer's and Corporate Affairs, to co-ordinate strategic relationships and to act as a central repository for briefings and records of meetings.

Proposal

22. Members are asked to note this report.

Corporate & Strategic Implications

23. The use of CRM will support effective external engagement across delivery of the Corporate Plan. Alignment with the SRM strategy ensures that indicators of success, particularly on objective 7b ("Strengthen local, regional, national and international relationships to secure new opportunities for business, collaboration and innovation") are met.

Implications

24. There are no new financial, legal, property or human resource implications.

Conclusion

25. CityDynamics, the Corporation's customised CRM system, has been operational since July 2019 for strategic engagement, meaning that for the first time, the Corporation has a system that enables a holistic view and analysis of engagement at an individual and organisational level across the five departments on the system. This will support the benefits outlined along the four dimensions reported in this paper.

26. Early benefits have so far proven to be GDPR compliance, a much smaller and cleaner set of records, and shared briefings and better coordinated engagement. The system enhances productivity through more efficient processes, deepens the understanding of business and political stakeholders and informs coordinated and impactful engagement.

27. These new approaches will be further enhanced by the new SRM team in Q1 2010, and by technical development supporting mobile integration and integrated digital marketing.

28. Ongoing development will allow Remembrancer's and Mansion House events to be integrated and support digital management, with a first event planned and reported in the new platform during Q1 2020. The new platform will be ready to support further teams in Town Clerks and Mansion House that also undertake event management on a smaller scale.

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