

Committees: Corporate Projects Board Digital Services Sub Committee Projects Sub	Dates: 3 rd November 2021 5 th November 2021 17 th November 2021
Subject: Customer Relationship Management Unique Project Identifier: 11908	Gateway 6: Outcome Report Light
Report of: The Chief Operating Officer Choose an item. Report Author: Sam Collins	For Decision
PUBLIC	

Summary

1. Status update	<p>Project Description: The Customer Relationship Management Project sought to replace the historic Corporate CRM (CRM 2011) with two separate solutions. City Dynamics (Dynamics 365) provides functionality to manage the Corporation's Strategic Engagement activity and Events. City Services (Firmstep) has been implemented as the key software for the Contact Centre and for managing online customer transactions including reports, applications, bookings and payments. Firmstep also provides the customer portal and forms toolkit for online transactions and requests.</p> <p>RAG Status: Green (Amber at last report to Committee)</p> <p>Risk Status: Low (Low at last report to committee)</p> <p>Costed Risk Provision Utilised: N/A</p> <p>Final Outturn Cost: £323,027.92. The Project was completed within the increased budget envelope, following approval of the additional £105k, allocated from the Transformation Fund. The requirement for additional funding and increased requirements meant the project was not delivered within the original timescales.</p>
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<p>2. Next steps and requested decisions</p>	<p>Requested Decisions: Members are asked to note the content of the report and approve the closure of this project.</p>
<p>3. Key conclusions</p>	<p>The Customer Relationship Project has successfully concluded with the complete replacement of the CRM 2011 software, which posed a key corporate risk due to the age of the software and the compliance of the data held. City Dynamics (known as SEEMS – Strategic Engagement and Events Management System) is now in use by 130 staff across Innovation and Growth, Remembrancers, Mansion House and Corporate Affairs with the primary functionality for managing strategic relationships and events.</p> <p>An Issues Report was submitted to the Project Sub Committee in August 2018, requesting approval for an additional £105k, to provide additional external configuration support for City Dynamics due to a lack of internal resource capacity. The go live of the City Dynamics was the end of 2018. Since the initial go live of the platform, the IT Division, in partnership with the Business Intelligence Unit, have continued to provide new functionality and enhancements to derive further benefit from the organisation’s investment. Most recently this includes an e-invitations module for City Corporation events.</p> <p>City Services was made live in August 2018 and now provides the key software for the Contact Centre as well as around 100 online services for the City Corporation. It has managed over 32,000 submissions and taken £10.66M payments since the start of January 2020.</p>

Main Report

Design & Delivery Review

<p>4. Design into delivery</p>	<p>City Services – The City Services element of the project was delivered by the inhouse team, with support from the supplier, Firmstep. The Contact Centre module represented a significant focus of the delivery, and this was successfully implemented with input from City Corporation’s Contact Centre in the design and delivery of the Firmstep product. The module delivered a number of process improvements including the migration from e-mail inboxes to structured forms, and the IT Division continue to work with the</p>
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	<p>Contact Centre and Website Team to deliver further enhancements.</p> <p>The IT Division also has an ongoing pipeline to develop new online services for departments across the City Corporation. The City Services software now provides around 100 online services for the City Corporation, has had over 32,000 submissions and taken £10.66M payments since the start of January 2020.</p> <p>City Dynamics – The City Dynamics element of the CRM project was scoped and resourced according to a set of high level requirements which developed in terms of depth and breadth. The approved business case for City Dynamics was reliant upon internal development resource, however it was clear through the development of the solution, that there was insufficient capacity to deliver solely in-house. This assumption was based upon the simplistic requirements highlighted during the pilot exercise, but in hindsight, the project was not resourced sufficiently.</p> <p>An issues report sought £105k for additional external configuration support, which was sourced through a procurement exercise. The enhanced project resourcing allowed the project to progress and go live was at the end of 2018. CRM 2011 has now been fully decommissioned. The submission of the Gateway 6 report was delayed due to the Project Manager leaving the organisation before the report was completed.</p>
<p>5. Options appraisal</p>	<p>The key project decision was to split the requirements and deliver two separate software solutions; City Dynamics (Dynamics 365) and City Services (Firmstep). This decision has allowed the full requirements to be met across the two solutions, and at significantly lower development and ongoing licence costs.</p> <p>City Services, in isolation, would have been unable to provide the ‘purer’ Customer Relationship functionality for Strategic Engagement and Events, however has allowed a significant amount of the requirements to be met through a cost effective, ‘off the shelf’ product.</p> <p>City Dynamics was able to meet the more bespoke requirements for Strategic Engagement and Events, however would have come at a significantly higher development cost, as well an increased licence cost, if this had been used to meet all project requirements.</p>
<p>6. Procurement route</p>	<p>City Services – A tender specification for the transactional CRM was prepared and published via the G-Cloud 9 framework. A report</p>

	<p>was approved by IT Category Board on 10th October 2017 which recommended that a 2+2year contract be awarded to Firmstep.</p> <p>City Dynamics – Additional Consultancy Support was sourced through an open tender and awarded to Orange Maple in August 2018.</p>
7. Skills base	<p>City Services – The Firmstep software was delivered primarily by the inhouse team, with additional support from the suppliers. The City Corporation had experience of using the Firmstep product, so were able progress with the implementation without issue.</p> <p>City Dynamics – An assumption was made that this element of the project would be delivered using in-house resource, however given the complexities in the depth and breadth of the project, additional external configuration support was required. This required an additional £105k, allocated from the Transformation Fund.</p>
8. Stakeholders	<p>City Services – The Contact Centre were fully engaged in the design and delivery of the Firmstep Service product, which is now being used successfully. The product delivered a number of process improvements including the migration from e-mail inboxes to structured forms, and the Applications Team continue to work with them to deliver further enhancements.</p> <p>City Dynamics – A cross-departmental project team was formed for this project, with representatives from the IT Division, Town Clerk's and Remembrancers. An Executive Steering Group was also formed by the Project Sponsor, to provide guidance to the project and take key decisions.</p>

Variation Review

9. Assessment of project against key milestones	<p>The City Services element of the project was delivered on time and within budget, with a final go live date of August 2018.</p> <p>The City Dynamics implementation timescales were impacted and the go live was delayed until late 2018. Since the initial go live of the platform, the IT Division, in partnership with the Business Intelligence Unit, have continued to provide new functionality and enhancements to derive further benefit from the organisation's investment.</p>
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<p>10. Assessment of project against Scope</p>	<p>The project has now fully delivered against the originally agreed scope which included;</p> <ul style="list-style-type: none"> • To provide a software solution which meets the documented requirements of the Corporation and Police for the management of Service Requests, Stakeholders and Events. • To maintain the ability of the Corporation Contact Centre to sustain the current level of service after moving into the JCCR. • To Provide a platform for future enhancements and customer services development across both the JCCR and strategic engagement.
<p>11. Risks and issues</p>	<p>One the of the key risks highlighted was around a replacement for CRM 2011 not being in place for the move of the Contact Centre into the Joint Contact and Control Centre. This risk did not occur, as the City Services product was delivered prior to the move and continued to work well following the move.</p> <p>A key issue around resourcing of the City Dynamics element was not foreseen. The approved business case for City Dynamics was reliant upon internal development resource, however it was clear during the development, that there was insufficient capacity to deliver solely in-house. This assumption was based upon the simplistic requirements highlighted during the pilot exercise, but in hindsight, the project was not resourced sufficiently.</p>
<p>12. Transition to BAU</p>	<p>City Services – The Firmstep product was implemented in partnership between the inhouse team and the supplier’s project team. As such, there were no issues in transitioning BAU support across to the IT Division.</p> <p>City Dynamics – Firstline support for Dynamics 365 is provided by the Business Intelligence Unit (BIU) which resides in Innovation and Growth. Following the project, the IT Division have also created a new Dynamics 365 analyst role, which provides second technical support as well as limited development capacity.</p>

Value Review

<p>13. Budget</p>	<table border="1"> <tr> <td data-bbox="486 1854 783 1928"> <p><i>Estimated Outturn Cost (G2)</i></p> </td> <td data-bbox="783 1854 1366 1928"> <p>Estimated cost (including risk): £343,000.00</p> </td> </tr> </table>	<p><i>Estimated Outturn Cost (G2)</i></p>	<p>Estimated cost (including risk): £343,000.00</p>
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<p>14. Investment</p>	<p>The Business Case for the project was based primarily on the replacement of ageing software and the mitigation of Corporate Risk and was not intended to deliver financial benefits.</p>																														
<p>15. Assessment of project against SMART objectives</p>	<ul style="list-style-type: none"> • Implementation of solution for stakeholder and events management by end of 2017, taking on board Lessons Learned from the Salesforce Pilot – the project failed to meet the initial timescales, however has now been successfully completed. • Decommission of Salesforce Pilot by end of December 2017 – the Salesforce pilot was successfully decommissioned. • Delivery of the JCCR, with appropriate software by end of April 2018 – City Services went live in August 2018 • Decommission of CRM infrastructure by end of April 2018 – this was delayed, however all original CRM infrastructure has now been decommissioned. 																														
<p>16. Key benefits realised</p>	<p><i>The Gateway 1234 Report noted the following benefits;</i></p> <ul style="list-style-type: none"> • The reduction of risk through the replacement of a key corporate system that is out of mainstream support – delivered. • The provision of a shared CRM solution, to underpin the delivery of the JCCR and future improvements in customer service delivery for both the Corporation and City Police – delivered. 																														

	<ul style="list-style-type: none"> • The Corporation and City Police both use the same online forms tool, with the procurement of a new CRM Lite, this will provide an opportunity to have electronic end to end transactions for both organisations, supported by the JCCR – delivered. • Provision of a shared tool for stakeholder and events management – which will enable a single view of stakeholders and engagement across the Corporation and Police – delivered. • Revenue savings of £56k through decommissioning CRM infrastructure – to offset future licensing costs – delivered.
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Lessons Learned and Recommendations

<p>17. Positive reflections</p>	<p>The City Corporation now has the use of two modern Customer Relationship Management Systems dedicated to the management of Strategic Engagement and Events, as well as the delivery of online services. These platforms have enabled a fundamental shift towards more collaborative and efficient ways of working, with electronic end to end processes and improved service experience for our customers.</p> <p>The Dynamics 365 and Firmstep software provide the basis for further expansion across more City Corporation services which could also benefit from more joined up ways or working and/or online / electronic end to end services.</p> <p>The project has also fostered a very positive working relationship across the software users, the IT Division, and the Business Intelligence Unit – and these continue to deliver further enhancements on the platforms.</p>
<p>18. Improvement reflections</p>	<p>The aim of the project was not simply to deliver software, but to agree a common, cross-departmental approach to engagement with the Corporation’s senior stakeholders – supported by a common tool (City Dynamics) to monitor and measure the level of engagement. Although an initial Pilot was undertaken, the requirements were not sufficiently detailed, not just for the technology but for the associated business processes. The initial discovery phase should have included a much broader spectrum of users at a more senior</p>

	level – with the business processes agreed ahead of the software development, and not the other way around.
19. Sharing best practice	<p>The City Corporation now has 130 users of the City Dynamics platform, as well as around 100 services being delivered online. The project has greatly increased the organisation's knowledge in the use of Customer Relationship Management best practice, as well as instilling a greater level of collaboration and knowledge sharing across departments.</p> <p>The City Corporation continues to move more services online, delivered through the City Services platform. Lessons learned through this project have enabled these services to be delivered in a more efficient way, with a focus on improved back office processes, as well as improved customer experience.</p> <p>Through this project the City Corporation has also developed knowledge in the management of data and its information assets, with increased confidence that the information is being processed in line with relevant legislation – with the relevant consents, retention schedules and data processing agreements in place.</p>
20. AOB	N/A

Appendices

Appendix 1	Project Coversheet
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Contact

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