

Project Coversheet

[1] Ownership

Unique Project Identifier: 11908 **Report Date:** November 2021
Core Project Name: Customer Relationship Management Project
Programme Affiliation (if applicable): N/A
Project Manager: Sam Collins
Next Gateway to be passed: Gateway 6

[2] Project Brief

Project Mission statement: This project seeks to replace CRM 2011, with two separate CRM systems; City Services (Firmstep) for the Contact Centre and Online transactions and City Dynamics (Microsoft Dynamics 365) for Strategic Engagement and Events Management.

Definition of need: This replaces CRM software (CRM 2011) that is end of life and out of extended support. This will be replaced by two separate systems, which are both fully supported and procured on a Software as a Service basis. These will provide additional functionality during the initial phase as well as the opportunity for further functionality or wider use in the future.

Key measures of success:

- 1) Allow for the decommission of existing CRM 2011 infrastructure
- 2) Meet the needs of the Contact Centre and Online transactions such as bookings, payments, applications and requests
- 3) Provide a modern, fit for purpose solution which can meet the Organisation's needs for recording and tracking Strategic Engagement activity and Events Management. These will put in place agreed and standardised approaches for Strategic Stakeholder Management for the organisation.

[3] Highlights

Finance:

Total anticipated cost to deliver: Up to £343,000

Total anticipated on-going commitment post-delivery: N/A

[A] Budget Approved to Date	[B] New Financial Requests	[C] New Budget Total (Post approval)
£238,000	£105,000 – to be funded from the Transformation Budget	£343,000
[D] Previous Total Estimated Cost of Project	[E] New Total Estimated Cost of Project	[F] Variance in Total Estimated Cost of Project (since last report)
£238,000	£343,000	£105,000
[G] Spend to Date	[H] Anticipated future budget requests	
£323,027.92	None	

Headline Financial changes:

Since 'Project Proposal' (G2) report:

◀▶ £238,000

Since 'Options Appraisal and Design' (G3-4) report:

◀▶ £238,000

Since 'Authority to start Work' (G5) report:

▼ £238,000, an additional £105,000 was sought to provide external support to meet the more detailed requirements around security and permissions, and to ensure that the Go Live deadline is met.

Project Status:**Overall RAG rating:** Green**Previous RAG rating:** Amber**[4] Member Decisions and Delegated Authority**

N/A

[5] Narrative and change**Date and type of last report:**

Issue Report – August 2018

Key headline updates and change since last report.

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.

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.

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.

Headline Scope/Design changes, reasons why, impact of change:**Since 'Project Proposal' (G2) report:**

N/A

Since 'Options Appraisal and Design' (G3-4 report):

N/A

Since 'Authority to Start Work' (G5) report:

An additional £105,000 was sought to provide additional external support to meet the more detailed requirements around security and permissions, and to ensure that the Go Live deadline is met.

Timetable and Milestones:

Expected timeframe for the project delivery: The initial timescale for Go Live was 8th August for Firmstep and early September 2018 for City Dynamics.

Milestones:

- | |
|--|
| 1) Go Live of the City Services (Firmstep) solution for the Contact Centre – Weds 8 th August |
| 2) Go Live of the Strategic Engagement solution for Town Clerks, MH and Remembrancers – Sept 2018 |
| 3) Go Live of the Events Management solution for Town Clerks, MH and Remembrancers – Sept 2018 |

Are we on track for this stage of the project against the plan/major milestones? N

The project was delayed due to more detailed and additional requirements during the configuration of the new City Dynamics solution. The Project is now complete.

Are we on track for completing the project against the expected timeframe for project delivery? N

The Project is now complete.

Risks and Issues**Top 3 risks:**

<i>Risk description</i>	<i>There is a risk that the solution will not be delivered within the revised timescales</i>
<i>Risk description</i>	<i>There is a risk that the delivered solutions will not meet requirements fully</i>
<i>Risk description</i>	<i>There is a risk that the organisation will be unable to decommission CRM 2011 infrastructure</i>

Top 3 issues realised

<i>Issue Description</i>	<i>Impact and action taken</i>	<i>Realised Cost</i>
Issue	<i>There is an issue that additional and more detailed requirements have emerged during the project. Additional funding to provide additional external support is being sought.</i>	£105,000
Issue	<i>There is an issue that the project has been delayed due to additional requirements and re-work. Additional funding to provide additional external support is being sought.</i>	As above
Issue	<i>There is an issue that that original project budget is now unlikely to be sufficient due to extended configuration periods. Additional funding to provide additional external support is being sought.</i>	As above

Has this project generated public or media impact and response which the City of London has needed to manage or is managing?

No.