

**Decision Maker:**      **Executive**

**Date:**                      **10th February 2016**

**Decision Type:**      Non-Urgent                      Executive                      Non-Key

**Title:**                      **REVIEW OF CORPORATE CUSTOMER SERVICES IT SYSTEMS**

**Contact Officer:**      Duncan Bridgewater, Head of Customer Service  
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**Chief Officer:**              Mark Bowen, Director of Corporate Services

**Ward:**                      (All Wards);

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1.      Reason for report

- Support service for the current version of the corporate Customer Relationship Management (CRM) system, provided by Microsoft, expires in March 2018.
- We have also been recently advised that support service for the version of the web site content management system, provided by Jadu, will also cease in September 2016.

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2.      **RECOMMENDATIONS**

2.1      **Executive are requested to:**

- (a) **agree that officers proceed to scope requirements and produce a technical specification and a thorough review of the current market and options, which includes a full lifecycle cost and potential savings compared to current expenditure;**
- (b) **agree the inclusion of a Customer Services Systems Review & replacement scheme in the Council's Capital Programme with an initial budget of £100k as detailed in para 5.1;**
- (c) **note that a further, fully costed recommendation and options appraisal to either upgrade or replace the current systems will be reported back later in 2016.**

### Corporate Policy

1. Policy Status: Existing Policy
  2. BBB Priority: Excellent Council
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### Financial

1. Cost of proposal: Estimated Cost: £100k
  2. Ongoing costs: Not Applicable
  3. Budget head/performance centre: Customer Services
  4. Total current budget for this head: £937k
  5. Source of funding: Capital Programme
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### Staff

1. Number of staff (current and additional): sector specialist and project support resources
  2. If from existing staff resources, number of staff hours: some input from existing staff
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### Legal

1. Legal Requirement: Non-Statutory - Government Guidance
  2. Call-in: Applicable
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### Customer Impact

1. Estimated number of users/beneficiaries (current and projected):all customers
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### Ward Councillor Views

1. Have Ward Councillors been asked for comments? No
2. Summary of Ward Councillors comments: N/A

### 3 COMMENTARY

- 3.1 This reports sets out the business case to allocate suitable funds to recruit a suitable Subject Matter Expert (SME) to review the current systems, review the market to produce a technical specification and a further recommendation or options for Members to consider.
- 3.2 There is no one with the required experience within the Council currently to carry out this activity. Previous budget options which delivered reductions in core staffing recognised the need to recruit the necessary expertise as and when required rather than maintaining a standing resource.
- 3.3 This also represents a good opportunity for the Council to review the provision of these systems and potentially identify savings and efficiencies as a result and to ensure alignment with key corporate programmes.
- 3.4 The Subject Matter Expert is needed to undertake work to identify the ongoing requirements of supporting systems and project management. The resource management will be within the ISD division with sign off by the services involved.
- 3.5 This makes best use of the resources now available within the organisation, and supports service leads
- 3.6 The system reviews identified by this report are two of several core system reviews that will be required over the next few years. The resource identified in this report for initial draw-down may be used flexibly across a number of system reviews and programme upgrades in the longer term, although initially required on Web and CRM reviews given the initial timescales available.

#### **Microsoft Dynamics CRM System**

- 3.7 Originally procured in 2007, the system was upgraded to version 4 in 2008. It is this version we are currently using.
- 3.8 We have made enquiries about extending support for the current version beyond 2018, and have been advised by our Microsoft Licencing partner that this is likely to cost in excess of £100,000 per annum.
- 3.9 The CRM system is mainly used by Customer Services, Liberata, Waste Services and Veolia.
- 3.10 Customer contact is recorded in the CRM system from customer phone calls in the Contact Centres, via web forms, web portals (MyBromley, Fix My Street), voice recognition system, visitors to Reception and e-mails through [csc@bromley.gov.uk](mailto:csc@bromley.gov.uk) . Additionally, the system supports the service requirements for Waste Services – it provides workflow, reports and customer data for both the Bromley Waste Team and Contractor.
- 3.11 There are integrations between the CRM system and a number of back office systems, which allow automated transfer of data between front office service teams and customers, through to back office teams and contractors.
- 3.12 This integration also allows data to flow back into CRM when the request is fulfilled, which is then or can be relayed out to the customer.
- 3.13 These systems include Uniform and Confirm which are used by the ECS Department across a wide range of high-profile, public facing services

- 3.14 CRM also provides the data store for customers who have registered for a MyBromley account – currently over 15,000.
- 3.15 There are over 245,000 customer records in CRM, with a distribution list of over 54,000 who are regularly sent electronic version of the corporate newsletter 'Update'.
- 3.16 A high proportion of the Council's customer contact is processed in some way through this system.
- 3.17 The system therefore plays a key role in our ability to know who our customers are, what they are contacting us about, what we do as a result of that contact.
- 3.18 It enables us to communicate with them, inform them of items of interest and potentially change their behaviour in how they make contact with us in the future.

### **Jadu CMS System**

- 3.20 The Jadu CMS supports all aspects of [www.bromley.gov.uk](http://www.bromley.gov.uk) currently handling over 4,000,000 visitors annually, who view over 14,000,000 pages.
- 3.21 It is a key system for the Council to support this significant contact volume efficiently and affordably.
- 3.22 The web site itself has over 4,000 pages of content and was upgraded to be responsive in 2014 to improve and enhance customers using it from mobiles and tablet devices.
- 3.23 There are around 90 web forms that have been developed in house, which result in around 68,000 annual submissions, some including payments via the e-pay module.
- 3.24 Additionally the 'Fix My Street' reporting tool has been embedded into the site and results in around 20,000 reports per year.
- 3.25 Jadu have confirmed that although support will end in September 2016, they will maintain support provided there is a project in progress to move us off the current version.
- 3.26 These systems have become integral to a wide range of customer transactions.
- 3.27 It is essential that the Council maintain supported systems in both these areas, as severe reputational damage could occur should these systems fail.
- 3.28 Additionally, they enable us to provide self-service opportunities for customers, which in turn provide the platform to reduce contact costs in the future.
- 3.29 Although non statutory, these systems support services that do provide statutory services.
- 3.30 Reviewing both systems simultaneously could provide additional benefits for the Council.
- 3.31 Initial market research of current CRM system providers appear that they can supply a number of 'bolt-on' options, which may enable the Council to reduce the number of supporting systems currently within the organisation leading to a more inclusive and easier to manage/support solution..

- 3.32 These include on-line diary and appointment booking, queue management for face to face services, on-line self-service account and fault reporting modules.
- 3.33 A further menu of options available could also deploy enhanced systems such as mobile access for field based staff, including:
- Web reporting
  - Workflow Management
  - Online portals
  - Online application forms
  - Online appointment booking
  - Online payments
  - Social Media
  - Telephone calls
- 3.34 The current Web solution is hosted which improves support and upgrades being delivered smoothly and more importantly in a commissioning environment allows 3<sup>rd</sup> parties to communicate with the system without coming direct through the LBB network and the security protocols required in each of those instances.
- 3.35 As well as allowing the logging and processing of customer enquiries and contacts CRM systems are also offering built in powerful analytical tools to map trends, explore relationships, demographics, channels and assist an organisation's communication and marketing allowing for insightful and targeted output across a multiple of platforms.
- 3.36 A small project team has already been established which has begun to research the market. This group is made up of representatives from Corporate IT, Customer Services and Environment.
- 3.37 Timeframes are quite tight now, as a full calendar year is often required to implement an upgrade or system change of this size.
- 3.38 Factoring in time to carry out the procurement, the scoping of needs and technical requirements therefore needs to begin immediately, and approval is sought for an initial £100k funding which is required, mainly for a temporary resource to manage the technical scoping/specification work required in this highly complex and specialist area.
- 3.39 The full outcome of the investigation along with a full recommendation and/or options will be provided for Members later in the year to consider prior to a further request for draw down funding to cover the full system implementation costs.

## **4 POLICY IMPLICATIONS**

- 4.1 Continuation and investment in these systems will support the Council's objectives of providing efficient services and excellent council in Building a Better Bromley, and supports the delivery of high standards of service across all areas of our borough.
- 4.2 Corporate Operating Principles state that for our customers we will reduce to overall need to contact the Council. Where contact is necessary, we will ensure that it is accessible, convenient, efficient and responsive to demand. These systems underpin this principle.

## 5 FINANCIAL IMPLICATIONS

5.1 The estimated cost of the initial work that is required during 2016/17 totals £100k as detailed in the table below.

	<b>£'000</b>
Scoping and Implementation specialist	60
Business process mapping	10
Project support	10
Bromley Knowledge (Liberata)	20
	<u>100</u>

5.2 Subsequent costs are likely to include upgrade or system costs from system suppliers, project management costs, Liberata and Bromley Knowledge resource costs and IT contractor delivery costs. At present, estimated upgrade costs from the current system providers for their elements only are £115k for CRM and £60k for Web. Full details of all implementation costs will be reported to Members for approval once a thorough evaluation of options has been completed.

5.3 The majority of the ongoing revenue costs relating to the website are recharged to Liberata as part of the Customer Services element of the contract, however there is a hosting element relating to Housing Registration forms, as well as the E-Payments support which are funded by the Council. The current revenue cost to the Council of the systems is £17k per annum as detailed to in the table below.

	<b>£'000</b>	<b>£'000</b>
<b>Web:</b>		
Jadu X-Forms	3	
Jadu Content Management	5	
Jadu E-Pay	2	
Blue Sky Hosting	48	
Blue Sky Hosting (Housing element)	<u>5</u>	
		63
Less costs recharged to Liberata		-56
<b>CRM:</b>		
Licenses		10
		<u>17</u>

5.4 It is currently anticipated that the ongoing revenue costs of the systems will be contained within the existing budgets; however this will be covered in the subsequent report later in the year which will include details of all revenue implications including any potential savings.

## 6 LEGAL IMPLICATIONS

6.1 Early indications suggest that many of the providers of these systems are part of various procurement frameworks, which may prove favourable in achieving the limited timescales.

<b>Non-Applicable Sections:</b>	None
Background Documents: (Access via Contact Officer)	None