

Decision Maker: Portfolio Holder for Resources, Commissioning and Contracts Management

Date: For Pre-Decision Scrutiny by the Executive, Resources and Contracts PDS Committee on 25 May 2021

Decision Type: Non-Urgent Executive Non-Key

Title: **POST COMPLETION REVIEW REPORT: UPGRADE OF CORPORATE CUSTOMER SERVICES IT SYSTEMS INCLUDING MS DYNAMICS CRM SYSTEM AND CORPORATE WEBSITE**

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Chief Officer: Charles Obazuaye – Director of HR & Customer Services

Ward: All

1. Reason for report

- 1.1 For the Portfolio Holder to review and endorse the successful outcomes of the Capital Programmes outlined below which were achieved within budget and within timescale.
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2. **RECOMMENDATION(S)**

- 2.1 That the Portfolio Holder endorses the findings of the Post Completion Reviews that have been carried out in respect of:
- The successful upgrade of the CMS Corporate Website to the Jadu Continuum product and the successful migration of the My Bromley Accounts to the new software.
 - The successful upgrade of Microsoft Dynamics to Version 2011 and the completion of the IT Options Appraisal which outlined the roadmap to move from Dynamics 2011 to Jadu CXM.

Corporate Policy

1. Policy Status: Existing Policy: Capital Programme monitoring and review is part of the planning and review process for all services. Capital schemes help to maintain and improve the quality of life in the borough. Effective asset management planning (AMP) is a crucial corporate activity if a local authority is to achieve its corporate and service aims and objectives and deliver its services. For each of our portfolios and service priorities, we review our main aims and outcomes through the AMP process and identify those that require the use of capital assets. Our primary concern is to ensure that capital investment provides value for money and matches the Council's overall priorities as set out in the Community Plan and in "Building a Better Bromley"..
 2. BBB Priority: Excellent Council
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Financial

1. Cost of proposal: £583k
 2. Ongoing costs: £6k p.a.
 3. Budget head/performance centre: Capital Programme 936459 & 936460
 4. Total current budget for this head: £719k
 5. Source of funding: Capital receipts
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Staff

1. Number of staff (current and additional): 4
 2. If from existing staff resources, number of staff hours: Exchequer Contract
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Legal

1. Legal Requirement: Non-Statutory - Government Guidance
 2. Call-in: Not Applicable
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Customer Impact

1. Estimated number of users/beneficiaries (current and projected): 11 million annual website visitors
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Ward Councillor Views

1. Have Ward Councillors been asked for comments? N/A
2. Summary of Ward Councillors comments: N/A

3. COMMENTARY

IT system review and website upgrade

- 3.1 In February 2016, Executive approved a capital budget of £100k to review and scope long term requirements of the Web and Customer Relationship Management (CRM) systems.

Website Upgrade

- 3.2 Within this review period, the Council was advised that the version of the Website Content Management System (CMS) provided by 'Jadu' being used by the council, would cease support in September 2016.
- 3.3 Executive agreed to an additional sum of £176K to be added to the capital scheme to fund the upgrade of the CMS to the Jadu Continuum product and within this work. Liberata were commissioned to upgrade the CMS and the components of the MyBromley Account. This included providing appropriate staff resource to transition to the new systems, avoiding service interruption, as additional work associated with their existing contract.
- 3.4 The upgrade works were completed £6K under budget and within timescales. The CMS upgrade had a dependency on the MyBromley Account web portal upgrade. This project was completed first in June 2018. Customer accounts were transferred to the new operating software and account holders asked to re-set their security at first log on the new system, which in-turn allowed full access to their Revenue & Benefits services online.
- 3.5 Following the completion of MyBromley Account upgrade, the CMS was upgraded to the Jadu Continuum product and completed in January 2019. Since the upgrade, the Continuum product provides improved content management functionality for the Website Editing team and has maintained its continuous release functionality, removing the need for future large upgrades as new features are automatically released in patches. Due to the seamless upgrade, there was no recorded negative customer feedback, as online services were not interrupted.

IT System Review

- 3.6 The outcome from initial IT system review work, agreed in February 2016, carried out by BT was reported back to the Executive in September 2016, highlighting that further, more detailed review work was required given the complex nature of the system deployment, and the wider commissioned landscape of the cross-department services and contractors using the software.
- 3.7 Therefore in September 2016, the Executive agreed to set aside a sum under the existing capital budget of £50k to fund an ongoing and detailed review of alternative options for the Microsoft Dynamics Customer Relationship Management (CRM) system both for the short and longer term.
- 3.8 This review work was carried out, and on 10 January 2018, and Executive agreed to commission BT by variation to their existing contract to apply an interim upgrade to Dynamics Version 2011 to avoid critical service interruption. As part of this work, BT by variation to their existing contract were also asked to provide a further fully costed options appraisal for the longer-term provision of IT services delivered by the current CRM system. Executive approved an addition of £480k to the capital programme, made up from an unused £37k reduction to the existing capital scheme for the IT systems review, and £443k from capital receipts.
- 3.9 The upgrade of Dynamics to Version 2011 was successfully completed in June 2018. The project was successful in achieving its aims and was achieved under BT's original estimated budget. The upgrade was seamless and there was minimal system downtime which meant that the customers and the Contact Centre experienced very little disruption.

3.10 Within this exercise, BT completed the options appraisal for the longer-term provision of the CRM system. The outcome of the appraisal and decision to move to the new Jadu CXM system was agreed by Executive on 16 October 2019. The project to move to Jadu CXM is currently underway and is on target to meet the deadline when the current software is no longer supported.

3.11 Scheme objectives

The objectives of the scheme were 1. to provide the Council with upgraded and compliant IT systems for web and customer services, and 2. a recommended pathway to the future provision for customer relationship management software.

3.12 Assessment of success

Both objectives were successfully achieved, with a lower cost than estimated in the original reports.

Assessment of Contract Efficiency

The upgraded systems contribute effectively to the Council's customer service provision and have supported significant increases in on-line contact since the Covid pandemic and may be extended to wider use across the organisation.

3.13 Outstanding issues

There are no outstanding issues arising from this scheme, and the output from the review work forms the basis of the new capital scheme agreed by Executive in October 2019 to deploy new software.

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 the 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.
- 4.3 With 11 million annual users to the web site, customers expect 24/7 access to services, with an experience that is more convenient than telephoning or visiting the offices. It is essential the Council maintains investment in this growing contact channel.
- 4.4 MyBromley Account further enhances that experience by personalising on-line customer interactions with us, enables direct access to secure financial information which can be accessed anytime making future interactions on-line more likely.

5. FINANCIAL IMPLICATIONS

- 5.1 This report provides information on a Post Completion Review that has been carried out in respect of Review of Customer Services IT systems. There are no financial implications arising from the matters addressed in this report.
- 5.2 The table below summarises the capital cost of upgrading the Web and CRM systems and the review work to provide the future roadmap for the CRM system:

Date of Approval	Activity	Approved Funding £'000	Actual Spend £'000	Variation £'000
Feb-16	Review work	100	13	-87
Sep-16	Website upgrade	176	170	-6
Jan-18	CRM upgrade & review	443	400	-43
		719	583	-136

5.3 As approved by the Executive on 16 October 2019 (ref: CEO19001B), the unused funding balance of £136k was transferred towards funding the Customer Services IT System Replacement capital scheme.

5.4 There are no additional revenue budget implications arising from this scheme as any ongoing support costs are provided for in the existing revenue budget.

Non-Applicable Sections:	Legal, Personnel & Procurement Implications, Impact on Vulnerable Adults and Children, Consultation
Background Documents: (Access via Contact Officer)	

