

Decision Maker: Executive

Date: 22 September 2021

Decision Type: Non-Urgent Executive

Title: CRM Replacement Project - Website Redesign and Upgrade

Contact Officer: Duncan Bridgewater, Assistant Director - Customer Services
Tel: 0208 461 7676 E-mail: duncan.bridgewater@bromley.gov.uk

Chief Officer: Charles Obazuaye, Director of HR, Customer Services and Public Affairs

Ward: All

1. Reason for report

This report provides an update on the CRM replacement project and seeks Member's approval to progressing the complimentary scheme to redesign and upgrade of the Council's public facing website.

2. **RECOMMENDATION(S)**

Executive is requested to:

- 2.1 Note the estimated underspend of approximately £372K for the CRM capital project scheme as outlined in this report. The actual figure will be confirmed within the capital scheme project closure report.
- 2.2 Approve additional expenditure of £175K on the website redesign and upgrade project, to compliment the CRM replacement project.
- 2.3 To fund the website redesign and upgrade project from the existing CRM capital programme provision and to amend the capital programme to reflect the revised total estimated costs to be funded of £625k.

Impact on Vulnerable Adults and Children

1. Summary of Impact: An Equality Impact Assessment indicates that ongoing support for vulnerable adults and children will be provided by Customer Service by phone and face to face for those unable to access digital services. For those unable to visit or phone us, this proposal will enhance the range of self-service options.
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Corporate Policy

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

1. Cost of proposal: £175k
 2. Ongoing costs: Recurring Cost: £39K per annum
 3. Budget head/performance centre: Capital Programme – CRM Replacement Project
 4. Total current budget for this head: £822k
 5. Source of funding: Capital Receipts and Customer Services Revenue Budget
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Personnel

1. Number of staff (current and additional): N/A
 2. If from existing staff resources, number of staff hours: N/A
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Legal

1. Legal Requirement: Non-Statutory - Government Guidance:
 2. Call-in: Applicable:
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Procurement

1. Summary of Procurement Implications: None
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Customer Impact

Estimated number of users/beneficiaries (current and projected): In total, there are 3,500 pages of information on Bromley's main website. During 2020 the website received 23 million individual page views. Over 60% of these visits were made using a mobile phone or tablet. In total, there are over 260 transactional Jadu forms generating around 10,000 service requests per month.

During the COVID-19 first and second lockdowns the Council has seen a big increase in customers accessing the website. Pre-covid, the Council received 4.5 million web visits annually, and post-covid there has been 11 million web visits annually.

Ward Councillor Views

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

3. COMMENTARY

Background

- 3.1 In October 2019, Executive agreed to upgrade the Council's Customer Relationship Management System (CRM) to the Jadu CXM system on the outcome of the BT options appraisal and recommendation review report. The recommended and selected option, Jadu CXM, was chosen due to the enhanced case management functionality and due to the already obtained Jadu suite of systems that the Council currently uses for website content management, web forms and the e-pay service. CXM is a further module of the software from the provider and is a configurable case management system that can be integrated with other key line of business systems and aligns to the corporate website software.
- 3.2 BT was commissioned to carry out the implementation of the CXM system including implementing all associated integration software alongside the Bromley project team. Work was successfully completed in the summer of 2021. The CXM system is now live including the integration middleware tool for the Contact Centre and back-end service areas to receive an action service requests. The project is currently in its final stages of closure along with decommissioning the old CRM system.

CRM Replacement Project

- 3.3 The CRM replacement project had a total budget of £822K. The software has been deployed successfully and came in under budget. With decommissioning activities of the old software under way, the total estimated spend is £450K. This has been achieved by officers by a number of scope changes that and are outlined below:
- 3.3.1 BT's initial implementation costs outlined in their proposal were based on non TUPE rates for the engineers that were due to work on the project. However, due to the nature of the project and the resources available at the time officers were actually able to secure BT TUPE engineers and therefore 3rd party staff costs were significantly reduced.
- 3.3.2 Result of the Environmental Services Commissioning:
- At the time of BT producing the CRM Review report, the Council was mid-way through the Environmental Commissioning project. It was recognised at the time there would be a significant impact on the CRM replacement project depending on the outcome of the commissioning work and contract mobilisation. The most significant factors were how the services would breakdown across the different service lots and the potential number of organisations involved and what their technical capabilities were. As a consequence of such unknown factors the proposed solution, and therefore associated costs, provided in the report were based on the likelihood of the most complex outcome. When the actual contract was awarded the outcome was less complex and in the early stages of the Environmental Services transition work officers were able to simplify a number data processes and consequently reduce cost.
- 3.3.3 Maturity of the Jadu product:
- 'Out of the Box' features in the Jadu CXM product have 'matured' since the BT CRM Review report was produced and therefore the Council was able to take advantage of these technology advancements. Specifically, the systems integration aspects, previously required a more substantial integration middleware solution, this was not ultimately required, and officers were able to deploy a simplified integration.
- 3.3.4 Removal of some services requiring the use of CRM:
- During the pre-deployment solution analysis work, back-office services were consulted about their data capture in the CRM system. From this officers ascertained that some services were looking at alternative solutions for how they interact with their customers and there was an opportunity to simplify or remove some of the functions being performed by the current CRM system. These are outlined below:

- Waste Services - (Veolia's ECHO system and the aspirational Fix My Street product to be used for the provision of missed collections). With printed waste publications such as tip permits and waste calendars provided by the CXM product.
- Anti-Social Behaviour transferred to eCins portal.
- Significant number of legacy forms not required as a consequence of not being used or used so infrequently that an alternative provision was more cost-effective.
- Certain features such as complaint escalations, have been implemented in a different way, due to differences in technologies and therefore reducing complexity.

3.3.5 Fix My Street solution:

Environmental Services deployed the MySociety Fix My Street product to the Contact Centre as the case management system for Streets and Greenspace cases. This was in light of an options appraisal investigation that was undertaken to determine the new emerging functionality that MySociety had created. This emerged after the BT CRM options report was produced and was therefore not included as an option. This new technology linked the FMS front end case management system to the back end 'Confirm' system which Environmental Services staff already use. Therefore, considerably less effort and expenditure were required to deploy this solution to the Contact Centre.

Website Redesign and Upgrade Project

- 3.4 The Jadu software running Bromley's public facing website has been in place for 9 years and is regularly upgraded through the Council's system support contract. However, the design itself has seen only minor tweaks in that period with the basic structure of the website remaining the same, as has the look and feel and technology that sits behind the web pages. The website has millions of visitors per year and receives little negative customer feedback.
- 3.5 The Coronavirus pandemic has seen a significant shift in the way customers do business with the Council. Over the last year visits to the website have increased exponentially, more than tripling after the first lockdown in March 2020, and then settling to a level around double of previous year's levels. It is important to capitalise on this increase and look for opportunities to reduce previous customer routes and build better online offers. Refining the provision of web services through the new website software, the Jadu CXM and web forms modules will support this objective and aligns to the objectives of the CRM capital scheme.
- 3.6 The Council's Customer Service's service delivery partner (Liberata) who manage and edit the public website (www.bromley.gov.uk) were tasked to carry out a review of the Council's website as part of the new contract that commenced with the provider on the 1st of April 2020. The review's findings concluded that the website is visually and technically tired in terms of its design templates, whilst being fragmented with a number of sub-sites. Technologically, things have moved on over the years with the use of mobile technology which Liberata feels is not reflected in the current structure and functionality of the existing website.
- 3.7 Liberata have recommended that the current website provider (Jadu) is commissioned to undertake a redesign of the website, utilising their Photon platform to improve accessibility, security and search engine optimisations of the site whilst offering a long-term solution to managing templates on the council's sub-sites. Photon would support any design changes required as a result of broader personalisation of pages and the integration opportunities from Jadu's CXM product to enhance the overall customer experience. It would also safeguard long term technical support and also unify the template technology across all Jadu products, CMS, XFP and CXM that are currently in place with the provider, as well as benefiting other customer facing systems using the website templates.
- 3.8 A full re-design process is currently being undertaken driven by customer engagement, service-based representative engagement and using behavioural analytics tools to arrive to an evidence led final design. Redesigning the main corporate website on Jadu's new technological platform would also enable Bromley to take advantage of emerging technologies in the future such as web bots to gain better online

engagement from its customers, collect form data more accurately and develop further self-service functionality, capitalising on the investment in CXM. This will be considered as a phase 2 element of the project once the redesign work has been completed and further reported to Members.

- 3.9 As part of the new Jadu design offering, the recommendation has been to migrate the website from the current BlueSky hosting provider to Jadu's own hosting managed platform. This is due to a technological difference in server stacks and the performance of the website being improved on Jadu's own hosting servers. By moving to Jadu's hosted platform, this also favours the Council's IT strategy which states where possible, vendor hosted solutions should be used. Taking into consideration the contractual arrangements with BlueSky which are due to end in 2023, and the potential to opt for a more resilient hosting package, and a more strategically compliant and future proof solution for Bromley, this is the favoured way forward.
- 3.10 In order to relocate the software there will be one-off implementation costs of £175K which includes the relocation of software components, parallel running of both hosting services during construction and associated load and security testing activities.

Estimated capital costs:

Activity	£'000
Software deployment costs	105
Security and Load Testing	22
Parallel server running costs	25
Project Management	23
Total	175

- 3.11 To date, the website redesign project has commenced under Chief Officer approval, and consultation has taken place with Chief Officers, the Leader and, Portfolio Holders for this work to commence. During this consultation an initial draft website wireframe design has been produced and agreed. Further design iterations will be subject to approval and in consultation with Chief Officers and key Members moving forward.
- 3.12 In order to enable the Council to take full advantage of the latest technology developments and ensure full functionality and improvements offered by the replacement CXM software and associated modules, Members are asked to note the need for the Council to relocate the hosting service of the public facing website. There is an estimated implementation cost of £175k which can be met from the unspent balance of the capital programme budget for the CRM replacement scheme.

4. IMPACT ON VULNERABLE ADULTS AND CHILDREN

- 4.1 The project will ensure the new site is accessibility compliant and will meet or be working towards meeting all web content accessibility guidelines.

5. POLICY IMPLICATIONS

- 5.1 Corporate IT strategy states the Council should use 'off the shelf' functional software where possible and avoid bespoke configuration. Cloud based applications are also preferred by this strategy. This report directly aligns to that strategic vision.
- 5.2 The new design best enables the Council to maximise digital take-up and expand the range of services available through it, with simple non-technical configuration possible along with a library of established processes deployed in other Councils across the UK.

- 5.3 The recommended software can be aligned to established integrations into an increasing number of local authority lines of business systems, which will support any future wider application across the Council.

6. FINANCIAL IMPLICATIONS

- 6.1 The final cost of the CRM replacement project is £450k, which would result in an underspend of £372k against the available capital programme budget of £822k.
- 6.2 The one-off cost of relocating the hosting service of the public facing website is estimated at £175k and, subject to Members' agreement, can be met from within the existing capital programme provision for the CRM replacement scheme. The final total estimated cost for the overall project would therefore be £625k, an overall projected underspending of £197k. The Capital Programme will need amending accordingly.
- 6.3 The Jadu annual hosting subscriptions and ongoing support contract of £39k per annum for the next 4 years will be funded from the existing revenue budget within Customer Services.

7. PERSONNEL IMPLICATIONS

None.

8. LEGAL IMPLICATIONS

- 8.1 There are no specific legal implications arising from the recommendation to re-allocate some of the CRM capital underspend to the redesign of the Council's public facing website.
- 8.2 Any contract entered into should be in compliance with the Council's Contract Procedure Rules.

9. PROCUREMENT IMPLICATIONS

- 9.1 If agreed, the contract for the provision of hosting services, referenced in this report, can be approved at an officer level by the relevant Chief Officer at an estimated value of £156k via the G Cloud Framework for a duration of 2+1+1 years.
- 9.2 In accordance with CPR 2.1.2, Officers must take all necessary professional advice.
- 9.3 The actions identified in this report are provided for within the Council's Contract Procedure Rules, and the proposed actions can be completed in compliance with their content.

Non-Applicable Sections:	[List non-applicable sections here]
Background Documents: (Access via Contact Officer)	[Title of document and date]