

**Meeting: Cabinet**

**Date: 15 June 2021**

**Wards Affected: All**

**Report Title: Customer Relationship Management System**

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## **1. Purpose of Report**

- 1.1 This report is presented to consider a proposal to appoint Civica as the preferred supplier for the new Customer Relationship Management (CRM) and allocate the budget accordingly to implement and maintain the new system.
- 1.2 A detailed business case has been created setting out how this will be achieved and the options considered.

## **2. Reason for Proposal and its benefits**

***We want Torbay and its residents to thrive by having a Council fit for the future***  
- The proposal set out within this report, and the associated business case help us to deliver this ambition.

- 2.1.1 Torbay Council, like other councils, continues to face the ongoing challenge of austerity and is rapidly realising that the opportunities for making savings are diminishing. In parallel to this, the Council is continuing its 'recovery programme' in response to the Covid-19 pandemic with the aim of ensuring our community, in its widest sense, is strengthened following this emergency.
- 2.1.2 Within this context, the Council needs to consider bigger and bolder transformation opportunities that build a sustainable operating model for the 21st century, post COVID-19 whilst also delivering a range of financial and non-financial benefits.
- 2.1.3 As such the Council's transformation plan (approved at Cabinet in September 2020) sets out how we will bring a coherent, joined-up approach to change, that meets the council's priorities as set out in our Community and Corporate Plan, and will support the delivery of financial targets in the Medium Term Resource Plan – this programme is called the 'Council Redesign Programme'. The main objective of the Council Redesign Programme is as follows:

To modernise, simplify and standardise how we work so we can support the communities of Torbay and build a resilient council fit for the future.

2.1.4 The focus of the 'Our Organisation Project', which is part of the Council Redesign Programme, is to "put our customers at the centre of our organisation." It aims to:

- Provide an effective, efficient and responsive gateway to Council services and external services;
- Streamline and standardise the processes by which the Council delivers cost effective services, becoming digital by default;
- Define the services that the Council provides, and those which it does not; empowering and enabling residents, businesses and communities to act;
- Ensure an appropriate focus on performance and risk management across the organisation.

2.2.1 A CRM system is an effective and efficient tool that provides an interface with its customers across several delivery channels (face to face, telephone, internet websites, texting and emails).

2.2.2 The Council has an existing partial CRM system although it has been identified that this is not fit for purpose.

2.2.3 To enable us to achieve the aims listed above, it has been identified the Council needs a new CRM system. Post approval to proceed to the preferred supplier stage of procurement, we are now at a point where a decision is required to move beyond this stage and start detailed discussions with Civica to start implementation.

2.2.4 As such it is recommended that the Council appoints Civica as the preferred supplier for the new Customer Relationship Management (CRM) and allocates the budget accordingly to implement and maintain the new system.

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### **3. Recommendation(s) / Proposed Decision**

1. That Cabinet approves Civica as the preferred supplier;

That Cabinet recommends to Council:

2 that £400,000 from the 2020/21 council underspend is allocated to the project for implementation costs; and

3 That Council notes that the profiling of spend over future years will be confirmed with the supplier once appointed and that the Council's future year budget proposals will need to reflect the additional costs of the new system. This depends on our ability to terminate other contracts and their ability to provide support, both of which require dovetailing. Current cost detail is contained within the relevant sections of business case at Appendix 1.

### **Appendices**

Appendix 1: Customer Relationship Management Business Case.

## **Background Documents**

N/A

## **Supporting Information**

### **1. Introduction**

- 1.1 'Customer relationship management' involves dealing with queries, complaints and specific requests and demands, with accurate information. To support this a CRM system can be used as an effective and efficient interface with its customers across several delivery channels (face to face, telephone, internet websites, texting and emails).
- 1.2 The council has an existing partial CRM system although it has been identified that this is not fit for purpose
- 1.3 It is proposed that the Council procures a new CRM system so that we can build a better picture of why customers contact us and improve service delivery.
- 1.4 As such a detailed business case has been attached at appendix one setting out what is currently provided, the strategic case for change, and the options considered.

### **2. Options under consideration**

- 2.1 Two options have been considered within the business case summarised as follows;
  - 1. Option One – Do Nothing
  - 2. Option Two – Procure and Implement a new CRM system provided by Civica.

Please see appendix one for the details of each option.

### **3. Financial Opportunities and Implications**

- 3.1 Please see the business case at appendix one for further details.

### **4. Legal Implications**

- 4.1 N/A

### **5. Engagement and Consultation**

- 5.1 Consultation with service users has been undertaken as part of the procurement process preparation.

### **6. Purchasing or Hiring of Goods and/or Services**

- 6.1 If the proposal is approved then the Council will continue with the procurement following the appropriate procedure as outlined within the Directive (2014/24/EU) and implemented in the United Kingdom by The Public Contracts Regulations 2015 (SI

2015/102) for a long-term agreement to supply, implement and maintain a CRM system.

## **7. Tackling Climate Change**

7.1 If the proposal to procure a new CRM system is approved it is expected that there will be less reliance on paper and printing following the system implementation. There is also likely to be a potential reduction in travel requirements for our customers resulting in an anticipated positive impact on climate change

## **8. Associated Risks**

8.1 Please see Section 3.1 in the business case for the risks and mitigations.

## Equality Impacts

9.	Identify the potential positive and negative impacts on specific groups			
		Positive Impact	Negative Impact & Mitigating Actions	Neutral Impact
	Older or younger people			No differential impact
	People with caring Responsibilities			No differential impact
	People with a disability			No differential impact
	Women or men			No differential impact
	People who are black or from a minority ethnic background (BME) <i>(Please note Gypsies / Roma are within this community)</i>			No differential impact
	Religion or belief (including lack of belief)			No differential impact
	People who are lesbian, gay or bisexual			No differential impact
	People who are transgendered			No differential impact
	People who are in a marriage or civil partnership			No differential impact
	Women who are pregnant / on maternity leave			No differential impact

	Socio-economic impacts (Including impact on child poverty issues and deprivation)	Less reliance on paper and printing, and also a potential reduction in travel requirements for our customers resulting in an anticipated positive impact on climate change.	
	Public Health impacts (How will your proposal impact on the general health of the population of Torbay)		No differential impact
<b>10..</b>	<b>Cumulative Council Impact</b> (proposed changes elsewhere which might worsen the impacts identified above)	<p>If the proposal to procure a new CRM system is approved then the cumulative impact to the council will be positive – the critical success factors will be as follows;</p> <ul style="list-style-type: none"> <li>• Improved customer service and quality</li> <li>• Service efficiencies and productivity improvements</li> <li>• Cost reductions and savings</li> </ul>	
<b>11.</b>	<b>Cumulative Community Impacts</b> (proposed changes within the wider community (inc the public sector) which might worsen the impacts identified above)	No differential impact.	