

## **Record of Decisions**

### **Customer Relationship Management System (CRM)**

#### **Decision Taker**

Cabinet on 15 June 2021

#### **Decision**

i) That Civica be approved as the preferred supplier; and

That Cabinet recommends to Council:

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

iii) 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.

#### **Reason for the Decision**

To modernise, simplify and standardise how the Council works in order to support the communities of Torbay and build a resilient council fit for the future.

#### **Implementation**

Recommendation (i) will come into force and may be implemented on 28 June 2021 unless the call-in procedure is triggered (as set out in the Standing Orders in relation to Overview and Scrutiny).

Recommendation (ii) and (iii) of the Cabinet will be considered at the Council meeting on 15 July 2021.

#### **Information**

'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).

The council has an existing partial CRM system although it has been identified that this is not fit for purpose. It was 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.

Councillor Carter proposed and Councillor Morey seconded a motion that was agreed unanimously by the Cabinet, as set out above.

## **Alternative Options considered and rejected at the time of the decision**

Two options were considered within the business case and summarised as follows:

- Option one – do nothing
- Option two – procure and implement a new CRM system provided by Civica.

### **Is this a Key Decision?**

No

### **Does the call-in procedure apply?**

Yes

**Declarations of interest** (including details of any relevant dispensations issued by the Standards Committee)

None.

### **Published**

18 June 2021

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Leader of Torbay Council on behalf of the Cabinet