Meeting: Cabinet   **Date:** 17th November 2020

Wards Affected: All

Report Title: Customer Relationship Management System

Cabinet Member Contact Details: Councillor Steve Darling, Leader of Council
steve.darling@torbay.gov.uk

Director/Assistant Director Contact Details: Anne-Marie Bond, Interim Chief Executive
anne-marie.bond@torbay.gov.uk & Matt Fairclough-Kay, Interim Assistant Director of
Corporate Services matt.fairclough-kay@torbay.gov.uk

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1. Purpose of Report

1.1 This report is presented to consider a proposal to undertake a procurement exercise
to identify a provider to supply, implement and maintain a new Customer Relationship
Management (CRM) system.

1.2 As such 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 Councils 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 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 is 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 To enable us to achieve the aims listed above, it has been identified the Council needs to procure an improved Customer Relationship Management (CRM) system.

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

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

2.2.6 As such it is recommended that the Council undertakes a procurement exercise to identify a provider to supply, implement and maintain a new Customer Relationship Management (CRM) system.

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3. Recommendation(s) / Proposed Decision

3.1 That Cabinet approves a procurement exercise to be undertaken to identify a provider to supply, implement and maintain a new Customer Relationship Management (CRM) system, with the outcome of the procurement exercise and the associated funding request to be presented to Cabinet and Council in due course.

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

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   If required consultation with service users will be undertaken at the appropriate time

6.   Purchasing or Hiring of Goods and/or Services

6.1   If the proposal to procure a new CRM system is approved then the Council will undertake a 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 the business case at appendix one for the risks, and suggested mitigations for each option.

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) *(Please note Gypsies / Roma are within this community)*			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
10..	**Cumulative Council Impact** (proposed changes elsewhere which might worsen the impacts identified above)	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; • Improved customer service and quality • Service efficiencies and productivity improvements • Cost reductions and savings		
11.	**Cumulative Community Impacts** (proposed changes within the wider community (inc the public sector) which might worsen the impacts identified above)	No differential impact.		