Subject:	**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM**
Meeting and Date:	**Cabinet – 8 July 2024**
Report of:	**Louise May, Strategic Director (Corporate and Regulatory)**
Portfolio Holder:	**Councillor Jamie Pout, Portfolio Holder for Transport, Licensing and Environmental Services**
Decision Type:	**Executive Key Decision**
Classification:	**Unrestricted**
Purpose of the report:	To purchase and implement a Customer Relationship Management (CRM) system.
Recommendation:	1. That Cabinet approves a project to procure and implement a corporate CRM solution. 2. That Cabinet authorises the Strategic Director (Corporate and Regulatory Services), in consultation with the Portfolio Holder for Transport, Licensing and Environmental Services, to take the necessary decisions and actions to progress the project, purchase and implement the system including (but not limited to) agreeing the system purchase price, and other associated project costs, and appointing any necessary professional advisors.

1. Summary

1.1. A Customer Relationship Management (CRM) is a solution used to manage interactions with customers, helping to build customer relationships and streamline processes, improving customer service.

1.2. This report seeks approval to run a procurement exercise to procure and implement a CRM solution, utilising the £300k budget allocated in the 2024/25 Medium Term Financial Plan. Pursuing this project aligns clearly with strategic priority five of the Council's objectives within the Corporate Plan, which is to modernise our Council. A key element of this is to improve and transform our service offering, through the innovative use of technology.

1.3. A focus on customer needs and a reduction in the cost of end to end service delivery will be an important criteria when looking at the procurement of a CRM, ensuring that customers and staff alike have access to accurate and up to date information regarding requests for service, that staff are empowered to act on that information and that the Council's service delivery is joined up and timely.

2. Introduction and Background

2.1. Customers currently interact with us in several different ways:

- In person visit
- Phone calls
- Forms via corporate or departmental systems
- Council Website
- Email
- Post

2.2. Promoting self service via the website creates efficiencies, saves money and is more convenient for our residents, enabling them to interact with us 24/7 at a time that suits them.

2.3. DDC has many systems which are built for the specific needs of departments. This creates silos of data which prevents the Council having one view of resident/customer data. The Council requires a modern cloud-based platform that can successfully integrate with both a customer facing self-service portal and its key business systems e.g. Housing, Council Tax etc. This will enable the Council to be more responsive to customer needs.

2.4. Issues that the Council currently have include the inability to directly provide progress updates back to customers, a requirement to double-handle information when using back-office systems and double handling of information when customers access services online. All of these can be rectified by the procurement of a CRM system, which, in turn, will reduce the risk of service failure.

2.5. Some of the existing systems have web portals which allow customers some self-service capability. However, these portals are disjointed, meaning customers need various account credentials for each one and must go to different portals for each departmental system, this is not the best experience and can lead to frustration.

2.6. The key feature of a CRM system includes an integrated website portal for customer contact, enabling customers to log in and receive updates regarding service requests without necessarily having to call the Council during office hours. This will ensure resources can be dedicated towards value-adding tasks, increasing efficiency, and minimising unnecessary administration, creating better outcomes for residents.

2.7. The availability of accurate and instant data can also be useful in analysing current requests and trends and predicting future demand for services.

2.8. A typical CRM solution might have features which when combined with existing technology enable digital transformation by automating or streamlining processes. Examples of this include:

- Integration - connecting to departmental systems using modern methods such as Application Programming Interface (API) which creates a secure connection to a system, allowing reading and updating of data they contain.

- In house development - allows DDC staff to create apps around internal processes, without having to pay money to external developers.

- Artificial Intelligence (AI) – can be used to predict outcomes and plan resources more effectively. It can also be used for communications, detecting the sentiment in text communications from customers, for example. AI can also be used for online chat bots to answer questions in real time.

- Legacy system connectivity – Some systems are not compatible with modern means of connectivity, CRMs can mimic repetitive tasks usually carried out by staff, creating efficiencies.

2.9. Each of the above capabilities are effective for different types of tasks, used together across processes, they will create a powerful toolkit to enable the Council to improve service delivery in an efficient way.

2.10. Connecting systems via integration will also enable the CRM to host a "My Account" portal, giving customers a single interface with access to a variety of Council systems for making and receiving updates on self-service requests.

2.11. There are some processes that can be completed end-to-end in the CRM, some will still have the departmental systems that the CRM will integrate with.

2.12. An example of an end-to-end process that can be completed within a CRM solution would be Freedom of Information (FOI) and Subject Access (SAR) Requests.

- Requests can be completed on online forms, creating a case in the CRM.

- Staff then identify who would have the requested information, listing those people in the case.

- Automated workflows, then request that data from departments.

- Once returned, data can then be readied for release, managed in the CRM.

- For FOI, the information can be passed automatically to the Council's Content Management System (CMS) which hosts the DDC website. Allowing transparency of FOI requests by making the information available to the public.

- For SAR, as these are requests for information DDC holds about the requestor, these could be completed, and data accessed via the "My Account" portal.

2.13. A CRM would allow us to understand our customers in a more holistic way. This includes the most common customer journeys, which if we got right the first time, would reduce the need for further interactions. For example, someone moving to Dover with no prior knowledge of the area, may wish to interact with several departments, such as Revenues and Benefits to set up a Council Tax payment, Tourism & Leisure to find out where to go and what to do, and parking to find out where to park on a journey they are taking. With a reservoir of knowledge on customer engagement, we could signpost common demographics to other information they may also find useful. This could be achieved by updating customer service scripts and text on websites. Cutting down on the number of interactions would improve efficiency and save money.

2.14. The procurement of a Customer Relationship Management (CRM) system would improve our communications and engagement with residents. The project would also sit alongside the future redesign of the corporate Dover District Council website.

3.   Identification of Options

3.1.   Option 1: Approve the project for procurement and implementation of a CRM.

3.2.   Option 2: Do not proceed with the project.

4.   Evaluation of Options

4.1.   Option 1 – The purchase of a CRM is a vital step in the technological journey of effective organisations. It will provide the tools needed to assist the Council in meeting its strategic goals and will allow us to continually improve the Council's technical, digital and customer service offering to our residents, members, and staff.

4.2.   Option 2 – The option not to proceed is not recommended as the benefits of Option 1 would then not be realised by the Council.

5.   Resource Implications

5.1.   As detailed in the 2024/25 budget and Medium-Term Financial Plan, the Digital & ICT Equipment & Servers reserve is held in order to support the requirements of the current and future digital strategies. This project falls within those requirements and a CRM proposed budget of £300k is included in the 2024/25 budget. Soft market

testing projections, indicate the cost of procurement and implementation can be accommodated within this budget. This would include the system procurement, external consultancy from subject matter experts, such as developers and officer time spent on the project.

5.2. Resource from the Digital team will include a Lead User, Technology team for support, Business Analyst, Project Manager, Web Analyst / Developer, and overall governance from the Digital and Technology Manager, with the project sponsor being the Strategic Director for Corporate and Regulatory Services. It is important to recognise that the adoption of a modern technology platform and the ability to take a customer focused approach to development of services will require a different way of working to be developed within the Council. Teams from across the Council will need to be involved to develop customer insight, undertaking service reviews and build new processes within the Council.

5.3. As part of the implementation of the new system, consideration will need to be given to the most appropriate and sustainable structures to support this change in working practices. A project team will consist of a range of staff from across the council involving key stakeholders from a variety of departments. A proportion of staff may need to be involved on a full-time basis at various points in the projects. Liaison with Corporate Management Team and Heads of Service will be undertaken throughout the project to identify appropriate resources to progress the implementation in each service area.

5.4. All reporting of project progress will be made to Corporate Management Team and the Portfolio Holder.

5.5. Implementation will be a long-term project which will be completed in several phases.

6.   Climate Change and Environmental Implications

6.1. Possible scope three emissions arising from this project will be considered at the procurement stage.

7.   Corporate Implications

7.1. Comment from the Section 151 Officer (linked to the MTFP): Members are reminded that the Council's resources are under pressure and so they will wish to assure themselves that all proposals progress the Council's priorities, are the best option available and will deliver value for money (AG).

7.2. Comment from the Solicitor to the Council: The Solicitor to the Council has been consulted in the preparation of this report and has no further comments to make

7.3 Comment from the Equalities Officer: On reviewing this report, it has highlighted the need for a full Equality Impact Assessment to be undertaken for the implementation of the CRM. In discharging their duties members are required to comply with the public sector equality duty as set out in Section 149 of the Equality Act 2010 http://www.legislation.gov.uk/ukpga/2010/15/section/149

7.4 Comment from the Climate Change Officer: No comments have been received by the Climate Change Officer.

8. Appendices

None.

9. Background Papers

Relevant papers on Digital Services files.

Contact Officer: Andrew Way, Technology Lead and Sharon Egin, Project Lead