Agenda item 8

Cabinet – 28 October 2020

Walsall Proud Programme – Enabling Technology supporting Customer Access Management to deliver Customer Relationship Management (CRM) technology for the Customer Experience Centre

Portfolio: Councillor Bird, Leader of the Council

Related portfolios: All

Service: ICT, Resources and Transformation

Wards: All

Key decision: Yes

Forward plan: Yes

1. Aim

1.1 In order to progress the Customer Access Management workstream of the Proud Programme, there is a requirement for the Council to appoint a partner to deliver the Customer Relationship Management (CRM) technology and build digital self-serve processes to improve the customer experience. This report seeks Cabinet approval to delegate authority to the Interim Executive Director for Resources and Transformation to award and enter into a contract with a business and systems integration partner.

2. Summary

2.1 This report is to address a specific delivery requirement for the procurement of essential services to configure and implement CRM technology to support the Customer Access and Management work stream (CAM). This entails engagement with a partner who will:

- Work with ICT to build the CRM solution including integrations with other key council systems (system integration)

- Work with The Customer Access Management workstream to map customer interaction and automate a number of council processes to make them accessible via the web (business integration)

- Transfer skills and expertise to Council staff to enable the Council to be progressively more self-sufficient in the future (systems and business integration)

2.2 CAM is an integral part of the Walsall Proud Programme; the CAM work stream will deliver against the following Proud promises:

- Improve outcomes and customer experience
- Improve employee satisfaction and engagement
- Improve service efficiency and performance

2.3 The technology required to support Walsall Proud Programme work streams is being delivered through the Proud work stream known as Enabling Technology. The Enabling Technology work stream is aligned to and is cross-cutting across all work streams within the Walsall Proud Programme and will strive to deliver technology solutions to timescale, budget and quality. Delivery of the customer platform will enable CAM to meet its delivery objectives and benefits.

2.4 The Enabling Technology work stream has been actively working with CAM over the past 11 months to establish an approach to technology delivery options and solutions to support the evolving Customer Experience Centre (CXC). The key solutions which are currently being specified are known collectively as 'The Integrated Customer Platform' are:

- Customer Relationship Management solution (CRM) – capability to record information about customer contact and to maintain progress against customer requirements, via integration with back office IT systems, enabling self-service opportunities for customers (outlined in this report).
- Service Channel Management solution (SCM) – capability for handling incoming communications to the Customer Experience Centre via Telephone, Email and Social Media. This project is already underway.
- Business Insights (BI) – capability to analyse information from existing IT systems to build greater insight into our services and customers' requirements.
- A new web site including improved functionality and content management.
- An online payments system to support the new web site functionality currently being defined.

Overarching the key solutions will be the ability to integrate applications and data and make digital processes easier for customers to access.

2.5 The next key technology capability which the Customer Access and Management work stream requires the Enabling Technology work stream to deliver is a customer relationship management solution (CRM). In order to meet the requirements of the Proud Programme, the first phase of CRM functionality including a number of customer facing digital processes is required by 1 April 2021.

2.6 The council does not currently have an integrated customer platform. Customer information is currently stored in a number of disparate systems which do not communicate with each other.

2.7 The CRM solution will provide the Customer Experience Centre and council services with the software required to record, manage and view information about customer contact with the council as they access a wide range of services. The software will be cloud hosted for resilience and will enable customers to 'self-serve'

on simple processes freeing up capacity within the Customer Contact Centre and enable services to focus on handling more complex customer needs.

2.8 This is a key decision because based on soft market testing, the anticipated lifetime contract value exceeds the £250,000 threshold for "significant" expenditure. The Customer Access and Management work stream and the underpinning CRM platform is also likely to have a positive impact on the delivery of council services in two or more wards within the borough as set out in the Council's Constitution.

2.9 This is a key enabling technology supporting the work of the Customer Access Management workstream. In order to achieve a delivery date for the CRM platform of 1 April 2021, a contract must be awarded to the successful bidder no later than 5 January 2021. The requirements on the Council under the Public Contracts Regulations 2015, together with the corresponding timing and sequencing of the implementation plan and Cabinet timetable, does not allow sufficient time to conclude the procurement process in time to enable a December 2020 Cabinet led contract award decision. Approval is therefore sought under this report to delegate authority to award the contract for the provision of Customer Relationship Management Business and System Integration Services, following the conclusion of a compliant procurement process.

3. Recommendations

3.1 That Cabinet delegate authority to the Interim Executive Director for Resources and Transformation in consultation with the Leader of the Council, to award a contract for the provision of Customer Relationship Management Business and System Integration Services, for an initial term of 2 years with the option to extend for up to a further 2 years, in 12 month increments.

3.2 That Cabinet delegate authority to the Interim Executive Director for Resources and Transformation to enter into the contract, and to subsequently authorise the sealing, signing or variation of any deeds, contracts or other related documents for such services, within the approved budget envelope.

4. Report detail - Know

4.1 Customer Access and Management (CAM) was established as a key capability for the council's future Ways of Working at the outset of the Walsall PROUD Programme. The key CAM activities were then defined and designed in 2019, as part of the council's functional model setting out how council activities will be organised in the future ways of working.

4.2 The implementation of the next steps for CAM transformation commenced in July 2020. To support the next steps, the Enabling Technology work stream is required to deliver the foundation of a Customer Relationship Management (CRM) platform and a number of automated processes in readiness for 1 April 2021; it should be noted that this milestone will not deliver the full CRM functionality – this will be built and integrated into other systems as the CAM work stream progresses.

4.3 A CRM platform will allow the creation of a 'golden customer record'. The CRM platform will support the development of the council's Customer Experience Centre (CXC).

4.4 In line with the ICT Strategy, the new CRM platform will be cloud based (software as a service) and will utilise Microsoft technologies. These CRM technologies are relatively new to the Council and we do not currently have the skills or expertise in-house to configure the CRM platform. Therefore we require specialist CRM Business and System Integration Services to undertake this work.

4.5 The purchase of appropriate Microsoft Licences is a key requirement, which is inextricably linked to this contract award. The licences are however not a component part of this contract award and will be compliantly procured via a separate contract, funding for which has previously been approved by Cabinet.

4.6 Work is underway to understand and build in-house ICT capability to support and further develop the CRM platform in the future.

4.7 A new CRM platform would be required regardless of the Walsall Proud Programme as the current systems used for managing customer contact are not integrated and rely on interrogating data held in a number of disparate business systems, which leads to a dis-jointed experience for customers.

4.8 The Customer Experience Centre will support the following Proud objectives:

- better use of resources (will be achieved by developing and training staff)
- automated recognition of customers (will be achieved by using identifiers such as phone number)
- pre-population of records with relevant customer data and notes, saving time and improving accuracy whilst remaining in compliance with GDPR requirements
- detailed capture of customer contact across council services, providing insights into types and volumes of contact per channel and service type
- adherence to Service Level Agreements and an enhanced capability to balance resources against demand levels

4.9 The procurement is for the engagement of a combined Business and Systems Integration partner who can deliver both the business process re-design and systems integration activity. This will minimise the risk of having multiple delivery partners and ensures the synergy required to successfully complete this work within a timely fashion. The successful partner will:

- Work with ICT to build the Customer Relationship Management (CRM) solution including integrations with other key council systems (system integration)

- Work with the Customer Access Management workstream to map customer interaction and automate a number of council processes to make them accessible via the web (business integration)

- Transfer skills and expertise to Council staff to enable the Council to be progressively more self-sufficient in the future (systems and business integration)

4.10 The Walsall Proud Programme will require the Council and its Officers to work flexibly within its governing processes and procedures whilst also providing Cabinet with a high level of assurance of compliance with the Council's Contract Rules and the Public Contracts Regulations 2015.

5. Council Corporate Plan priorities

5.1 The Walsall Proud Programme is fundamental to the successful delivery of all priorities, particularly on improving our Customers experience, employee satisfaction and an internal focus on efficiency.

6. Risk management

6.1 Effective governance arrangements are in place for the Walsall Proud Programme to allow for successful delivery of the programme. These consist of Walsall Proud Programme Board, Commercial Group, Design Authority, Customer Access & Management Steering Group.

6.2 The Enabling Technology work stream are working closely with the Walsall Proud Programme, Procurement and Legal Services to ensure that procurement activity is carried out safely and in compliance with both the Public Contracts Regulations 2015 and the Council's Contract Rules.

7. Financial implications

7.1 On 18 December 2019, Cabinet approved a variation to the 2019/20 capital programme which included £1,500,000 for the lifetime of the Enabling Technology workstream. Further funding of £10,200,000 for this workstream was approved on 12 February 2020. Funding will be made available from the transformation fund set up to deliver the Proud Programme benefits. An estimate of £6,250,000 has been allocated in the budget for the first 3 years of the contract. It is anticipated that at this point, the council will have sufficient skills and expertise to maintain and build on this technology. Indicative final figures for the first phase of the contract will not be known until the end of December 2020 when the successful tenderer is identified and the procurement moves to contract award.

7.2 The call off of each of the four intended phases of the contract by the council, will be based on the tender prices and rates which are tendered by the successful tenderer. Each phase will involve the council commissioning the modelling and configuration within the CRM system of a specific number of the council's business processes (based on 3 different levels of complexity), which the successful tenderer will then undertake in close collaboration with the Council (in particular ICT and the CAM workstream). The phases will therefore collectively encompass all of the Council's key business processes (numbering approximately 200 in total) in so far as these can be incorporated within the proposed CRM system.

8. Legal implications

8.1 The terms and conditions of contract will be negotiated as part of the competitive dialogue process. Legal Services have been engaged to support this process to ensure that suitable contracting arrangements are put in place and will continue to be involved to advise about and assist with negotiations, so that the contract will be in a form approved by the Head of Legal and Democratic Services as required under the council's Contract Rules and otherwise in accordance with the Public Contracts Regulations 2015.

9. Procurement Implications/Social Value

9.1 Via the Enabling Technology work stream of the Proud Programme, ICT is working closely with the CAM workstream leads and Procurement to define the high-level requirements for Customer Relationship Management Business and System Integration Services.

9.2 The procurement exercise and associated contract award will be conducted in accordance with the Public Contracts Regulations 2015, the Public Services (Social Value) Act 2012 and Walsall Council's Social Value Policy and Contract Rules.

9.3 In order to maximise innovation and benefit opportunity, based on best practice within this specialist marketplace, the procurement will be carried out using a Competitive Dialogue process. This process will enable the Council to shortlist up to 5 suppliers based on satisfactory due diligence and initial capability assessment. The Council will then enter into a second stage detailed competitive dialogue with the shortlisted bidders in order to establish the best value solution, which meets the Council's needs and objectives in addition to maximising added value

9.4 Subject to satisfactory completion, it is anticipated that the procurement process will conclude contract award around early January. The contract award decision will be published in accordance with regulatory and constitutional requirements

10. Property implications

10.1 There will be property implications related to the Customer Access and Management work stream for example when the Customer Experience Centre is developed; the Customer Access and Management work stream will report any property implications to Cabinet.

11. Health and wellbeing implications

11.1 The technology that will be delivered by the CRM platform will support employees in delivering their day to day business and services and will enhance their time at work by simplifying and automating processes freeing them up to undertake work which will add value to the citizens of Walsall.

11.2 ICT endeavour to ensure that all new technology allows for end users individual and unique characteristics and requirements; for example deploying lighter weight or smaller equipment or equipment with larger displays, larger monitors, dual

monitors, software to enlarge screen reading or to read aloud, different mouse/keyboard layouts, voice recording software, software configuration to enhance screen displays etc.

12. Staffing implications

12.1 There will be a requirement for the successful tenderer to train and upskill existing council staff in the use and support of the new technology that will be introduced by the CRM platform.

12.2 Staffing implications outside of training are being addressed in the overarching Customer Access and Management work stream.

13. Reducing Inequalities

13.1 An Equality Impact Assessment reference 29/19 commenced on 29 July 2019 for the Customer Access and Management work stream, this will continue to be reviewed by the CAM Steering Group as necessary and considered as part of the decision making process.

13.2 A separate Equality Impact Assessment reference 55/19 is being carried out for the Enabling Technology work stream which will encompass "supportive technology".

13.3 The Council is currently undertaking a programme of work to ensure that the services which are offered via the Council's website (digital services) comply with the Government Digital Standard (GDS). This standard has 14 requirements which when implemented will give assurance that users with protected characteristics have the same opportunity as others to access online services. The GDS Service Standard can be viewed here https://www.gov.uk/service-manual/service-standard.

The GDS standards are:

- Understand users and their needs
- Solve a whole problem for users
- Provide a joined up experience across all channels
- Make the service simple to use
- Make sure everyone can use the service
- Have a multidisciplinary team
- Use agile ways of working
- Iterate and improve frequently
- Create a secure service which protects users' privacy
- Define what success looks like and publish performance data
- Choose the right tools and technology
- Make new source code open
- Use and contribute to open standards, common components and patterns
- Operate a reliable service

13.4 All invitations to tender for ICT solutions refer to the Council's Vision; this being *that Inequalities are reduced and all potential is maximised. We are led by the*

communities we serve who help shape the services we provide and we help those communities to make a positive difference to their own lives through active civic engagement and co-operation.

Shortlisted bidders will be required to outline how their proposal takes into consideration the Council's objectives of reducing inequalities and increasing accessibility.

14. Consultation

14.1 Following Cabinet approval on 23 October 2019 to commence consultation/engagement to inform and shape future ways of working, the CAM Steering Group have completed consultation through Member workshops, customer focus groups, operational workshops, manager workshops and an online survey. Feedback from this consultation is recorded in EqIA reference 29/19.

14.2 Further specific consultation regarding CRM technology will be carried out as required within EqIA reference 55/19.

15. Decide

15.1 Cabinet is requested to approve the recommendation made in section 3 of this report.

16. Respond

16.1 In the event that Cabinet delegate authority to award a contract to the Interim Executive Director of Resources and Transformation, ICT will continue to work closely with all stakeholders to ensure that the CRM platform is implemented as required by the Customer Access and Management work stream.

17. Review

17.1 Monitoring, review and reporting progress of the CAM work stream will continue to be undertaken through current Proud PMO governance procedures.

Background papers

CAM Cabinet Report
CAM Draft EqIA ref 29/19
SCM Draft EqIA ref 55/19

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