NEWCASTLE-UNDER-LYME BOROUGH COUNCIL

**CORPORATE LEADERSHIP TEAM'S
REPORT TO
CABINET**

03/12/2024

Report Title: Procurement of Corporate CRM and Case Management system

Submitted by: Service Director – Information & Technology

Portfolios: One Council, People & Partnerships

Ward(s) affected: All

Purpose of the Report	**Key Decision** Yes ☐ No ☒

To seek Cabinet approval to procure a corporate CRM and Case management system, alongside a suitable partner to support the Council to deliver the programme.

Recommendation

That Cabinet:

1. Authorise the Chief Executive in consultation with the Portfolio Holder for One Council, People and Partnerships to enter into a contract by direct award to procure a suitable, modern CRM system.

2. Authorise the Chief Executive in consultation with the Portfolio Holder for One Council, People and Partnerships to enter into a contract by direct award with a suitably qualified CRM partner to design, deliver and support the CRM programme.

3. Approve the implementation of a single CRM and case management solution across all Council services.

Reasons

1. The Council has outgrown the capabilities of the current CRM platform. A modern CRM system that can operate cross-service will enable greater opportunities to deliver excellent services to our residents and businesses.

2. Harnessing new technologies to support service delivery and efficiency is a key strategy aim of the Council's Technology Strategy (2023-2028).

3. The use of a modern CRM platform will support the Council's target of becoming net zero by 2030.

1. Background

1.1 A key priority of the [Council Plan](#) is ensuring that Council services are efficient and effective, and deliver for local people. The Council's transformation programme, One Council embarked on a journey to change the way in which the Council operated, driving a new culture of modern service delivery, harnessing technology as a key business enabler.

The programme also implemented a new operating model to improve the way that we interact with our customers to provide the most efficient and effective service.

1.2 The One Council programme was further supported by the introduction of a new [Technology Strategy](#) which set out three strategic themes and actions;

1.2.1 Residents & Customer: *Supporting our residents, businesses, and visitors to access the services and information they require online. Whilst ensuring we provide a choice of access for those who are not digitally connected.*

1.2.2 Workforce: *Ensuring our workforce have the skills required to deliver services to our customers, as effectively and efficiently as possible, as well as the capacity for continuous learning and adaptation to respond to developments and changes.*

1.2.3 Infrastructure: *Work to enhance the technological infrastructure within the Borough, supporting access to technology, high-speed fibre broadband and internet connectivity*

1.3 The strategy recognised that some of the Council's current systems are no longer fit for purpose, and that it needs to transform its customer service delivery to meet the evolving needs and expectations of its customers. Harnessing newer technologies, such as Artificial Intelligence (AI), Machine Learning (ML) and Robotic Process Automation (RPA) in order to enhance service efficiency.

2. Issues

2.1 The Council has identified a number of key issues and gaps within the current application estate:

2.1.1 The Council uses multiple and disparate systems to manage customer data and interactions, which results in siloed and fragmented information, and prevents the Council from having a single view of the customer.

2.1.2 Many of the Council's systems are bespoke for local government. These systems require significant administrative support, lack integration with newer technologies (such as AI, RPA, ML) and/or are often expensive to procure.

2.1.3 Some departments utilise some manual data entry and paper-based processing, which are time-consuming, costly, and could be prone to errors and delays.

2.1.4 The Council offers limited self-service options and channels for customers to access information and services, which reduces customer satisfaction and engagement, and increases the demand for face-to-face and phone interactions.

2.1.5 Residents are required to create multiple accounts in order to access some Council systems, whilst some systems do not have any self-service functionality at all.

2.1.6 The Council has inconsistent communication with customers, which leads to confusion, frustration, and complaints.

2.1.7 The Council has limited insight and visibility into service performance and customer feedback, which hinders the Council from evaluating and improving its services, and from identifying and addressing customer issues and needs.

3. Recommendation

3.1 Authorise the Chief Executive in consultation with the Portfolio Holder for One Council, People and Partnerships to enter into a contract by direct award to procure a suitable, modern CRM system.

3.2 Authorise the Chief Executive in consultation with the Portfolio Holder for One Council, People and Partnerships to enter into a contract by direct award with a suitably qualified CRM partner to design, deliver and support the CRM programme.

3.3 Approve the implementation of a single CRM and case management solution across all Council services.

3.4 Approve the transition to paperless National Non-Domestic Rates (NNDR) billing for all NNDR accounts.

3.5 Approve the transition to paperless Council Tax billing for all new residents to the borough and promote paperless billing for all other residents.

4. Reasons

4.1 A key Strategic theme of the Council's 2023-2028 Technology Strategy is 'Residents & Customers', highlighting the Council's vision to improve digital services so that our residents, visitors, and businesses use our online services as the preferred method of contacting the Council. This is alongside the Council's ambition to learn from the best public and private sector organisations to ensure that services are simple, intuitive and inclusive.

4.2 In order to deliver the Council's Technology Strategy, Council services need to be agile to change, and the latest available technologies. One of such technology and change is to implement a single CRM system across the whole organisation, transitioning away from traditional, bespoke local government systems, where possible.

4.3 The introduction of a single CRM will drive efficiency and awareness by providing the Council, it's officers and members with a 'single view' of the

borough's residents and businesses. Pulling information from various Council systems, as well as national data sets to understand customer requirements, preferences and needs, in turn driving proactive and personalised delivery of services to our residents.

4.4   A cloud-based, single CRM system will bring numerous benefits to Council and its residents, businesses, and visitors, including:

      4.4.1   Improve customer service and satisfaction by utilising a unified and integrated CRM system that allows the Council to manage all customer data and interactions in one place.

      4.4.2   A single view of 'the customer' allowing the Council to understand the customer journey, preferences, and needs, enabling proactive and personalised service delivery.

      4.4.3   Creation of a single customer portal where residents and businesses can access all council services. Empowering customers to access information and services at anytime and anywhere, whilst being able to self-serve – creating new and updating and tracking the status of their existing requests for service/support.

      4.4.4   A flexible and scalable platform that can be configured and customised to suit the Council's specific needs and processes, and that can be easily integrated with other systems and applications (i.e. Microsoft Office, Telephony/Communication systems, Revenues & Benefits, and Waste Management systems).

      4.4.5   Reduced manual processing that saves time and resources and improves data quality and accuracy.

      4.4.6   Introduction of AI and RPA that enables the Council to automate repetitive and routine tasks, and to provide intelligent recommendations and insights.

      4.4.7   A user-friendly and intuitive interface that enables the Council's staff to manage cases and communications, whilst allowing residents the ability to keep track with the status of their case and provide information securely.

      4.4.8   An adaptable system that can be used for both external (residents/businesses) and internal uses, such as IT and Facilities incidents/service requests.

      4.4.9   Real-time reporting and data-driven decision making that allows the Council to monitor and measure service performance and customer satisfaction, and to identify areas for improvement and innovation.

      4.4.10 A secure and reliable platform that ensures the protection and availability of the Council's data and services, and that complies with the relevant data protection and privacy regulations.

4.5   A corporate CRM with in-built case, subscription and record management capabilities will enable the future retirement of numerous legacy Council

systems and applications. This will in turn drive financial cost savings and operational efficiencies.

4.6 Modern CRM platforms are licensed using a subscription-based model, which allows the Council to scale up or down licence numbers as required and on a phased basis. This will allow the Council to reduce duplication of spend and only onboard departments as their existing software contractual commitments come to an end. There may however be requirements to migrate some departments over to the CRM sooner than the contractual end date where it is deemed operationally necessary, for example Customer Services.

4.7 The Council makes use of several critical systems, such as Revenues and Benefits, and Waste Management. Due to the complexity of the systems, it is unlikely that all elements would be able to be replaced with a CRM solution. Instead, it is critical that any new CRM solution would be able to integrate into these systems, enabling self-service via the Council's single customer portal.

4.8 In order to deliver a cross-service CRM platform, the Council will require specialist support from a suitably qualified CRM partner. This partner will aid the council in designing, delivering and supporting the CRM platform.

4.9 A key part of this programme will focus on how the Council can make use of modern communication methods, such as email and SMS in order to reduce operational expenditure, such as manual processing, printing, and postage. This will not only support further reductions in operational expenditure but will also support the Council's net zero sustainability plans and improve productivity, for example the annual billing letter can be automatically generated and sent to residents via email, instead.

5. **Options Considered**

5.1 **Continue with Existing Supplier** – The Council are committed to ensuring that it transforms service delivery and realises opportunities for cost and operational service efficiency. Whilst continuing with the Council's current CRM provider would have been the easiest option, this solution would have limited the Council's ability to deliver a truly cross-organisational and transformational CRM solution with all of the latest technological advancements and integrations. For example, integration into the Council's telephony and unified communications platform.

5.2 **Procure a Modern, enterprise-level CRM platform (Recommended) -** The Council conducted a thorough analysis of its customer service requirements and objectives. During a recent proof-of-concept (PoC) programme, the enterprise-level CRM platform showcased its ability to operate as a 'single' platform, providing the necessary scalability and flexibility to support the enhancement of our operational service delivery.

6. **Legal and Statutory Implications**

6.1 The procurement route proposed in this report is compliant with the Public Contracts Regulations.

6.2 Note that Appendix A is exempt from publication (at the current time) on the basis set out in Paragraph 3 of Schedule 12A Local Government Act 1972, that it contains information relating to the financial or business affairs of any particular person, including the authority in question. It is considered that disclosure of this information at this time would be capable of having a significant detrimental impact on the efficacy of the authority's business affairs and its financial well-being.

7. Equality Impact Assessment

7.1 No adverse impact has been identified as a result of delivering this proposal.

8. Financial and Resource Implications

8.1 The preferred procurement route for this contract is direct award under a suitable, compliant procurement framework, such as G-Cloud or Crown Commercial Services (CCS).

8.2 The Council will make use of CCS Strategic Partnership Arrangement (2024) which provides public sector bodies a discounted, fixed price on Microsoft products for five years. The new arrangement between CCS, UK Government and Microsoft went live on 1st November 2024.

8.3 The CRM programme and solution will be delivered within the Councils existing budgets.

9. Major Risks & Mitigation

9.1 The council runs a risk to the delivery of operational services where it fails to invest in ICT and modern technologies.

    9.1.1 This is an identified risk within the Corporate Risk Management system under the ICT Services and Corporate Risk profile.

    9.1.2 The council have already taken steps to mitigate this risk with control measures, such as the implementation of a Technology Strategy, Consolidation of hardware and software and the One Council transformation programme.

    9.1.3 The procurement of a modern, adaptable CRM solution will allow the Council to respond to technological advancements and the changing landscape of local government legislative and operational requirements.

10. UN Sustainable Development Goals (UNSDG)
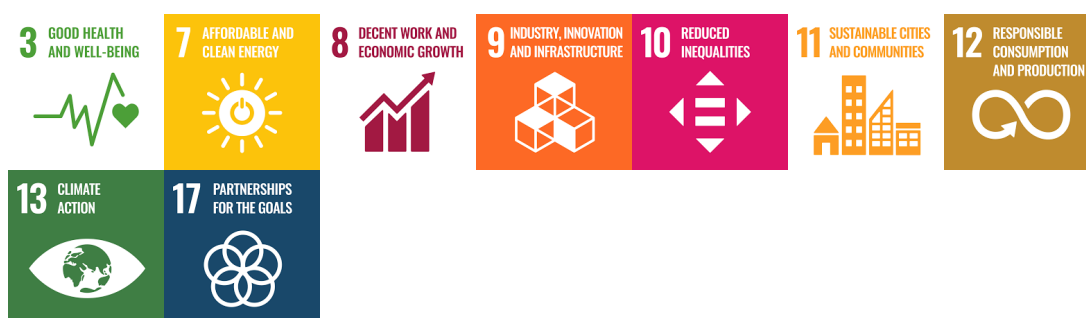
11. One Council

Please confirm that consideration has been given to the following programmes of work:

One Commercial Council ☒
One Digital Council ☒
One Green Council ☒

The procurement of a corporate CRM and case management system will work to support all three One Council programmes by improving operational efficiency, reducing cost expenditure, identifying opportunities for growth and development, and reducing carbon emissions by promoting sustainable practices and operations.

The developer of the cloud-based CRM platform is also committed to becoming carbon negative, water positive and zero waste by 2030. They are also already utilising renewable energy within their data centres.

12. Key Decision Information

12.1 N/A

13. Earlier Cabinet/Committee Resolutions

13.1 None

14. List of Appendices

14.1 Appendix A

15. Background Papers

15.1 Technology Strategy 2023-2028