

## EXECUTIVE

### 14<sup>th</sup> April 2022

<b>Report Title</b>	<b>CRM &amp; Low Code Platform – Building Strong Foundations</b>
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<b>Lead Member</b>	Councillor Lloyd Bunday, Executive Member for Finance and Transformation

<b>Key Decision</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Is the decision eligible for call-in by Scrutiny?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Are there public sector equality duty implications?</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>Does the report contain confidential or exempt information (whether in appendices or not)?</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>Applicable paragraph number/s for exemption from publication under Schedule 12A Local Government Act 1972</b>	

#### List of Appendices

None.

#### 1. Purpose of Report

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- 1.1. The purpose of this report is to seek the approval of the Executive to start the procurement process for a single Customer Relationship Management (CRM) system for the Council as the first part of the development of a North Northamptonshire Council low-code digital platform.

#### 2. Executive Summary

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- 2.1. This report outlines the current position of CRM systems across North Northamptonshire Council and the rationale to procure and implement the phasing of a single CRM that will deliver a single view of our customers when interacting through Customer Services. The go live date is planned to commence in April 2023.

### **3. Recommendations**

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- 3.1. It is recommended that the Executive:
- a) Approve the commencement of the procurement process to purchase and implement a single CRM system using a low code platform for North Northamptonshire Council.
  - b) Delegate authority to the Director of Transformation in consultation with the Executive Member for Finance, to take any further decisions and/or actions required to conclude this procurement, implement the system and deliver this project.
- 3.2. Reason for Recommendations – The Council will gain significant efficiencies from a single CRM system. It will enable Customer Services to move from five geographically separate teams to one single integrated team with a single view of our customers. Levels of customer service will be improved, and process efficiencies implemented.
- 3.3. Alternative Options Considered –
- Do nothing
  - Expand one of the current CRM systems
  - Procure a proprietary off the shelf CRM system
  - Procure a 'Lite' CRM system
  - Build a CRM system from Scratch
- 3.4. All of the alternative options shown above have been discounted as they do not provide an effective solution, for reasons set out in section 5 of this report.

### **4. Report Background**

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- 4.1. Customer Services is responsible for the first point of contact for many, but not all, services across the Council, by telephone, face to face, email and at Kettering only, webchat for residents.
- 4.2. Customers currently rightly see Customer Services as a single team, which is normally accessed via the Council's main telephone number. Behind this, calls are rerouted by location and issue. Customers select the service they require by using numbered options to access the service required to five teams that are both geographically and IT system separate, this is still largely based upon the four sovereign Borough and District Councils as well as the services that were provided by the former County Council.
- 4.3. Four CRM systems are currently operated in the Customer Service teams based at Corby, Kettering, One Angel Square and Thrapston. Wellingborough do not have a CRM. Of the four CRM systems in use, one becomes end of life in 2023, one reaches end of contract in 2023 and the other two are on rolling contracts. It is not possible to combine any of these systems without a full procurement process.

- 4.4. These constraints hamper more effective customer service as well as the financial and process efficiencies that one single integrated Customer Services team can offer our customers and prevent the five separate teams joining together as one team.
- 4.5. Implementation of a single solution will, together with implementation of a new corporate telephony solution, previously approved by Executive, allow the Council to move forward and deliver service and efficiency improvements. It also supports the delivery of efficiency savings in Customer Services as outlined in the Medium-Term Financial Plan (MTFP), which are £264,000 in 2022-23 and a further £106,000 in 2023-24. It is expected that in 2024-25 additional savings will also be possible after a new CRM system settles in, and further efficiencies can be identified and delivered.
- 4.6. A single CRM system as part of a digital platform will allow the Council to create a single view of customers, provide better customer service, and provide business intelligence. The Council will be able to offer more effective customer services, self-service and have a greater understanding of customer needs.
- 4.7. It will also allow the Council to have a picture of customers regardless of their access channel. It can then extend more widely across other Council services to enable a more holistic picture of customer needs, that often cover a range of services that currently do not share information. These can improve customer journeys and secure better outcomes.
- 4.8. The service will work closely with colleagues from Legal Services, Procurement, and IT to support the delivery of a CRM solution.

## 5. Issues and Choices

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- 5.1 There are several options for the way forward. These are now examined in detail.
- 5.2 **Do nothing.** There is an option to continue with existing systems. However, this is not considered feasible. Of the current four CRM systems, one is end of life in 2023 and the contract for a second expires on 31<sup>st</sup> March 2023. One Customer Services team does not have a CRM system at all. The Council needs to procure solutions in these instances to comply with procurement regulations. Lack of change will also prevent Customer Services moving to a one single integrated team.
- 5.3 **Expand a current CRM system.** Procurement considerations prevent expansion of one of the current systems to replace the other three in use. The Council would need to undertake a full procurement exercise in order to do this.
- 5.4 **Procure a proprietary off the shelf CRM.** This is a good option in a wide and mature market. However, it is discounted as it will be expensive, inflexible and

could limit the Council's ability to redesign services end to end to meet customer needs across the Council.

- 5.5 **Procure a "Lite CRM."** The new corporate telephony system currently being procured could include a Contact centre module. Whilst this would assist Customer Services in identifying customers and contact history when contacting the Council, this solution is very limited and could also limit the Council's need to transform services.
- 5.6 **Procure a CRM on a low-code platform.** Many low code platforms come with a CRM 'out-of-the-box;' this option is similar to option 3. However, it gives the Council more in terms of technical capability, flexibility, and ability to meet this need and longer-term strategic aims. This option allows the Council the capability to build upon and configure the CRM to meet specific needs and design it around its intended use as opposed to proprietary systems that do not offer this flexibility.
- 5.7 **Build a CRM system from scratch.** This would allow the Council to design exactly what it needs. However, there would be serious resource constraints in doing so, it would require skills not currently available within the Council and would prove a higher risk to implement and maintain.
- 5.8 The **recommended option** is that set out in **section 5.6** above, to procure a CRM on a low-code digital platform.
- 5.9 Low-code digital platforms have several modules that are easier to develop and include other applications that the Council can utilise in future, such as for managing Freedom of Information (FOI) requests, Complaints, and other databases. CRM would be the first module to be developed on the platform, which would make subsequent deployments quicker and easier. There are also low code suppliers in the local government marketplace with a range of modules already available such as CRM.
- 5.10 Low code will allow the Council to implement a CRM by April 2023 to ensure that a replacement for end of life /contract CRM systems is in place at that time. It can then be expanded to replace other existing CRM systems and then more widely across other Council services to assist building a single picture of customers.
- 5.11 A low code platform will contain the technical capability and tools that will allow the Council to accelerate delivery of several corporate priorities and use the out-of-the-box applications and capabilities that have already been built by other local authorities on the low-code platform, and to build on them to deliver solutions that work for the Council. CRM will be the first use of a low-code platform as a result of the issues highlighted in this report with end of life and end of contract for existing CRM systems, as well as the need to combine five disparate Customer Service teams into one integrated team.

## **6. Next Steps**

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6.1. Subject to approval of the way forward by Executive, these are the key milestones to deliver a CRM system by April 2023: -

Milestone	Date
Business case approved by Executive	14 <sup>th</sup> April 2022
Tender publication date	Beginning May 2022 (dependent on call in period post Executive decision)
Tender return date	Middle/End May 2022
Preferred supplier identified and approved	Beginning July 2022
Complete DPIA	Middle August 2022
Contract award date	Middle August 2022
Contract start date	Middle August 2022 (earlier if possible)
Supplier on-boarding	September /October 2022
Development	October 2022 to January 2023
Testing and training	February and March 2023
Live	April 2023

## **7. Implications (including financial implications)**

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### **7.1. Resources and Financial & Transformation Implications**

7.1.1. A soft market testing exercise has indicated that it is possible to deliver a low-code solution within the existing budget envelope of an annual revenue cost of circa £100,000. This is approximately the same as the current budgeted cost of the existing CRM systems.

7.1.2. There is also £250,000 available from the Business Rates Retention (BRR) scheme. This was made available to the Council before Vesting Day (1<sup>st</sup> April 2021). This amount has been allocated to deliver customer service improvements using technology and can be used to help develop and implement the CRM system.

- 7.1.3. This solution will also allow the Council to develop further software solutions at no additional cost. Being a low-code digital platform, it can be used to build applications for functions such as FOI, Complaints, SEND (Special Educational Needs and Disabilities) / EHCP (Education Health and Care Plan) redesign. Procuring a low-code digital platform already in use in local government will allow the Council to use solutions that other Councils have already created on the platform and to share technical advice at no additional cost.

## **7.2. Legal and Governance**

- 7.2.1. It is also not possible to extend the use of existing systems beyond 2023 without a procurement process as one reaches end of contract, and one reaches end of life. However, the other two are on rolling contracts.
- 7.2.2. Procurement advice has been sought, and the project team are proposing the use of a compliant framework agreement as the route to market. It is proposed that the G-Cloud framework, operated by Crown Commercial Service (CCS) be considered, in the first instance, to procure a low-code digital solution, where the solutions offered fully deliver the Council's requirement.
- 7.2.3. The Council has the power to enter into contracts in order discharge its functions (Local Government Act 1972, s111 and the Local Government (contract) Act 1997, s1).
- 7.2.4. The Local Government Act 1972 requires the Council to have regulations for how it enters into contracts. In addition to complying with all relevant UK and EU legislation every contract entered into on behalf of the Council must also comply with the Council's Contract Procedure Rules and the Council's Financial Regulations

## **7.3. Relevant Policies and Plans**

- 7.3.1. This project will meet all corporate priorities. It meets the corporate objective of modern public services by ensuring robust financial management of IT systems within current budgets, improving the efficiency and effectiveness of services, and using skills and technology most effectively.

## **7.4. Risk**

- 7.4.1. The risk is that the Council will not be able to deliver the same quality of service to residents contacting Customer Services across all geographical service locations if it has no replacement CRM in place when current contracts end.
- 7.4.2. Implementation of a low-code solution itself carries risk to the Council. Future changes may need to be made to applications built on the low-code platform; these should be possible at no additional cost using the Council's own resources.

- 7.4.3. Low-code platforms are not as mature, however a number of local authorities including Dorset Council (a recently created unitary authority) do use such platforms and that authority is very much seen as an exemplar of local authority digital transformation in similar circumstances to North Northamptonshire.

## **7.5. Consultation**

- 7.5.1. Consultation will take place with stakeholders as part of the procurement process.
- 7.5.2. Both staff and customers will be involved in testing and user experience exercises during the implementation phase, so that we can gain assurance that the system will be fit for both groups when it goes live.

## **7.6. Consideration by Executive Advisory Panel**

- 7.6.1. Officers will consult with the Executive Advisory Panel (EAP) for Service Delivery, Performance and Customers at the appropriate points during this project.

## **7.7. Consideration by Scrutiny**

- 7.7.1. The procurement process and /or any part of the requirement may be selected for consideration by Scrutiny.

## **7.8. Equality Implications**

- 7.8.1. The Council is committed to treating people fairly. Implementation of a low-code CRM system that encompasses all of Customer Services initially, then extends to other services will allow the Council to deliver the highest quality services to all customer groups so that they receive fair treatment in accordance with the Council's responsibilities under the Equality Act.

## **7.9. Climate Impact**

- 7.9.1. The Council, having declared a climate change emergency in June 2021, is committed to reducing its climate impact both within its own Council buildings and in working with businesses and the wider community to achieve net zero energy emissions. A single CRM system for the Council will allow a better picture of its customers, allowing Officers to have a greater understanding of them which should reduce the need for customers to travel to Council offices to access Customer Services.

## **7.10. Community Impact**

7.10.1. There are no distinct community impacts that may arise regarding the Council area, or particular localities within that.

7.11. **Crime and Disorder Impact**

7.11.1. There are no implications arising from any recommendations that are being proposed that have a crime and disorder impact.

**8. Background Papers**

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8.1. None.