WIRRAL

Policy and Performance - Transformation and Resources Committee
Tuesday, 22 March 2016

REPORT TITLE:	Customer Relationship Management System Update Report
REPORT OF:	Strategic Director: Transformation and Resources

1.0 REPORT SUMMARY

This report provides a progress update on the work being undertaken to review the council's Customer Relationship Management (CRM) system and identify future requirements that will align with Wirral's 2020 Vision.

2.0 BACKGROUND AND KEY ISSUES

2.1 Implementation of Oracle E-Business Suite

In 2005, as part of the '1Business' programme, the council implemented Oracle's E-Business Suite (EBS) as an Enterprise Resource Planning (ERP) system which was intended to support key corporate functions including Financials; HR; Procurement and CRM.

Currently the council only uses elements of Oracle EBS (see Appendix 1 for full details):

- **Financials** (General Ledger; Accounts Receivable/Payable; Cash Management and Inventory)
- **Procurement** (iProcurement)
- **CRM** (mainly Environment and Regulation services; E-mail Centre and Integrated webforms)

2.2 Implementation of Oracle CRM

Within a public sector context, a CRM manages customer interactions across multiple contact channels, providing a 'single view of the customer' and ensuring disparate services are equitable; joined up and customer focused.

When implementing the CRM element of Oracle EBS, significant effort was made to utilise the extensive functionality offered by Oracle's local government version of CRM (LG45) which focused on 'locality based' interactions such as those associated with Environment and Regulation services.

This has created some best practice processes including 'up-front' service information; transactional self-service; automated acknowledgement and Service Level Agreement confirmation; integration to the back office and out to external contractors; pro-active progress tracking; fulfilment update and post-delivery feedback.

However, this focus on locality based processes has meant the current CRM has struggled to support services centred on 'people' such as Revenues; Benefits; Children and Adult social care etc. This has resulted in the CRM becoming more of a legacy system for Environment and Regulation services rather than the intended unified customer interface across multiple council services.

As a consequence, key strategic outcomes such as a delivering 'digital by default' council services and having a 'single view of the customer' alongside expected operational outputs including reductions in the cost of service delivery have not been fully achieved by the current CRM implementation.

Another driver for reviewing Oracle CRM (and Oracle EBS) is that the version currently deployed by the council (v11.5.10) is out of supplier support and although a third-party vendor support package has been procured for the interim there is a longer-term requirement to upgrade or replace.

3.0   WORK UNDERTAKEN TO IDENTIFY FUTURE REQUIREMENTS

3.1   Project mandate and scope

Using the mandate described in point 2.2, a project was authorised to begin reviewing the current implementation of Oracle CRM and identifying future requirements to align with Wirral's 2020 Vision, with a particular focus on the following functionality:

- Customer/staff/councillor/partner interfaces
- Single sign-on and authentication to multiple services
- Self-service/mediated customer journeys and customer engagement
- 'End to end' automated processes
- Integration to third-party portals/functionality and 'back office' systems
- Creation of a 'single view of the customer'
- Reporting and analytics to enable customer insight

3.2   Soft-market testing

As there was a need to engage with the CRM supplier market, this specification was drawn up into a 'soft-market testing' (SMT) template after contributions from key stakeholders including customer services; transaction centre and IT services (see Appendix 2).

The SMT template was made available on the NW procurement portal (The Chest) to encourage submissions from interested suppliers. A total of 24 submissions were received which were shortlisted by key stakeholders to 10 suppliers based on their stated ability to meet the specification and

representing market leading CRM solutions. These shortlisted suppliers were then invited for presentations to a wider panel of council stakeholders drawn from across all council directorates; digital strategy team and members.

All 10 shortlisted suppliers have since presented their solutions to 100+ stakeholders with the following intended outputs:

- View of what the current/future requirements are across council directorates; members and wider Wirral partnership
- Familiarity with best practice case studies and latest technological innovations available on the market
- Understanding of current infrastructure and likely implementation issues
- Refined and comprehensive specification for corporate approval prior to initiating any procurement process

3.3 Next steps

Core stakeholders are currently reviewing the information supplied during the presentations; feedback provided by wider stakeholders and engaging with other local authorities who have recently implemented a similar approach. This process is expected to be complete by the end of March 2016.This will then inform a revised and comprehensive specification that will be shared again with wider stakeholders for feedback before approval by senior leadership team and members.

The expectation is that, in order to fulfil this specification and meet future business needs, a procurement process will invite prospective suppliers (not limited to previously shortlisted SMT suppliers) to submit tenders stating how their solutions meet these clearly defined requirements. The invitation to tender document is expected to be ready for publishing on the NW procurement portal by April 2016.

The core panel will then be responsible for reviewing/shortlisting and selecting a successful bidder who will engage with the council to confirm an agreed implementation schedule, within the terms laid out in the specification.

4.0 RECOMMENDATION

4.1 That the contents of this progress report are noted.

SUPPORTING INFORMATION

1.0 REASON/S FOR RECOMMENDATION/S

1.1 Report produced at the request of Transformation and Resources Policy & Performance Committee.

2.0 OTHER OPTIONS CONSIDERED

2.1 The option to remain with the current version of Oracle CRM was considered but as described in the project mandate (point 2.2) the current version is at 'end of life' and does not support operational or strategic requirements.

3.0 BACKGROUND INFORMATION

3.1 As described in point 2.0 (main report); appendices and reference material.

4.0 FINANCIAL IMPLICATIONS

4.1 There are no financial implications arising from this progress report.

5.0 LEGAL IMPLICATIONS

5.1 There are no legal implications arising from this progress report.

6.0 RESOURCE IMPLICATIONS: ICT, STAFFING AND ASSETS

6.1 There are no immediate resource implications arising from this progress report.

7.0 RELEVANT RISKS

7.1 There are no immediate risks arising from this progress report.

8.0 ENGAGEMENT/CONSULTATION

8.1 As described in point 3.2 (main report) there has been extensive engagement with stakeholders across the council; members; third-party suppliers and other local authorities with recent experience of similar implementations.

9.0 EQUALITY IMPLICATIONS

9.1 There are no immediate equality implications arising from this progress report though equality requirements will inform the revised specification.

REPORT AUTHOR: **Phil Russell**
                        Change Programme Manager
                        Telephone: (0151) 666 3092
                        Email: philrussell@wirral.gov.uk

APPENDICES

Appendix 1 – Wirral's implementation of Oracle E-Business Suite

Appendix 2 – CRM Soft Market Testing template

REFERENCE MATERIAL

SUBJECT HISTORY (last 3 years)

Council Meeting	Date
TRANSFORMATION AND RESOURCES POLICY AND PERFORMANCE COMMITTEE	**21ST SEPT 2015**