

TRAFFORD BOROUGH COUNCIL

STATEMENT OF EXECUTIVE DECISION

<u>DATE OF DECISION</u>	Wednesday, 1 June 2022	<u>DECISION MAKER</u>
<u>DECISION REFERENCE</u>	M/01.06.22/L	Leader of the Council (Councillor A. Western)

RECORD OF THE DECISION

Customer Relationship Management (CRM) System Replacement

1. That approval be given to the business case and proposal to fulfil the Council's future core CRM requirements with the Microsoft Dynamics 365 Customer Service solution.
2. That the strong alignment of implementing Microsoft Dynamics with existing IT and Digital commitments be noted.
3. That, for the reasons set out in the report, this decision be deemed urgent and not subject to call-in.

REASONS FOR THE DECISION

The Council was given notice that the current Civica CRM system would no longer be supported after 6 June 2023. The Council therefore needs to identify, source and implement a replacement CRM solution. Options to extend use of the existing Civica CRM solution beyond June 2023 are being considered as 15 months is not sufficient time to source and implement an alternative solution. The Council has already committed to M365 and the Microsoft Power Platform, so investigated whether the Microsoft Dynamics 365 Customer Service solution would be the most suitable CRM solution from a business, technical and architectural perspective. A review was undertaken during March and April and has concluded that Dynamics would be a good choice for Trafford Council.

An urgent decision is requested as the procurement of the Council's Microsoft licences through a new Enterprise Agreement needs to commence the week commencing 5 June 2022 to allow sufficient time for the procurement to be completed by the renewal date of 30 June 2022. The Enterprise Agreement includes the Council's M365 licences, Microsoft Power Platform licences, and upon approval of this proposal the Microsoft Dynamics 365 Customer Service licences.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED AT THE MEETING/BY MEMBERS

Undertake an open OJEU tender with the CRM provider market to procure a core CRM solution (i.e. not the full enterprise solution) and an implementation partner to deliver the implementation. This will include consideration of the wider CRM market including the new Civica cloud-based CRM called Digital 360 and alternatives from other suppliers. This route would delay the implementation work by approximately 3-4 months and is highly likely to lead to the same outcome as alignment with existing Microsoft solutions would be one of the main Trafford requirements.

CONFLICTS OF INTEREST DECLARED AND ANY ASSOCIATED DISPENSATION

None.

CALL-IN DEADLINE DATE

Not applicable.

For the reasons set out in the report, this decision has been deemed to be urgent and not subject to call-in.

PUBLICATION DATE

Wednesday, 8 June 2022

RECORDED BY:

Director of Legal and Governance