

TRAFFORD COUNCIL

Report to: Scrutiny Committee
Date: 10 January 2018
Report for: Approval
Report of: Scrutiny Committee Task & Finish Group: Review of the Council's Customer Relationship Manager (CRM) System

Report Title

Scrutiny Committee Task & Finish Group Review of the Council's Customer Relationship Manager (CRM) System.

Purpose

Following the Scrutiny Committee's Task and Finish Group Review of the Joint Venture Contract between Trafford Council and Amey during the 2016/17 municipal year, Members were alerted to some possible issues with the interfacing between the Council's CRM system and Amey systems. This prompted Scrutiny to conduct a review of the CRM system in its entirety, to provide assurance that the system is back on schedule to be fully implemented following some initial delays.

This report sets out the Task & Finish Group's findings and recommendations following the investigation.

Recommendations

That the recommendations set out below be endorsed by the Scrutiny Committee for referral to the Executive:

Recommendation 1 – That the Executive Member for Highways, Parks and Environmental Services continues to work closely with Amey on improving the interface between Amey systems and the Council's CRM system to ensure residents and Members have an effective portal for reporting incidents, as well as ensuring that performance reporting is as accurate as possible.

Recommendation 2 – That the Executive consider conducting a review the Council's procurement process for large IT projects to ascertain whether any lessons can be learned following the procurement of the CRM system.

Recommendation 3 – That a further update on the CRM's implementation be provided to Scrutiny in due course, reporting on progress against the timeline.

Contact person for access to background papers and further information:

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Extension: 2019

1. Background

Following the Scrutiny Committee's Task and Finish Group Review of the Joint Venture Contract between Trafford Council and Amey during the 2016/17 municipal year, Members were alerted to some possible issues with the interface between the Council's CRM system and Amey systems. This prompted Scrutiny to conduct a review of the CRM system in its entirety, to provide assurance that the system is back on track to be fully implemented following some initial delays.

Following the Executive's decision on 7 April 2014 to award the contract to Civica (previously Asidua), the implementation of the system has had a number of setbacks, causing delays. Officers were invited to discuss these issues and provide assurance that an action plan was now in place to drive the implementation forward.

2. Review Approach

Scrutiny Members reviewed the original Executive report considered as part of the initial decision making process, and invited the Corporate Director, Transformation and Resources, and the ICT Project Manager, to provide a presentation on the issues encountered and the action plan to remedy these.

Following the gathering of evidence and information, the Task and Finish Group aimed to provide their summary and recommendations, which are detailed in this report.

3. Membership of the Scrutiny Task and Finish Group

The review was carried out by

Councillors: M. Young, Cordingley, Bowker, Boyes, and Mrs. Dixon.

4. The CRM System

The CRM Customer Portal enables customers to:

- Submit service requests online, via phone and face to face
- Report problems e.g. a broken streetlight or a missed bin collection
- Request services e.g. assisted bin collections or submit an FOI request
- Apply for a service e.g. a blue car badge
- Find out if a problem has already been reported by someone else
- View their customer service history
- Receive email updates on their service requests
- Update their contact details
- Understand the eligibility criteria and SLAs for services

The system is provided and serviced by Civica, who are a global IT company that specialises in software and outsourcing. It has customers across national, regional and local government, health and care, education and public safety, and Trafford has a number of other Civica systems currently in place, including the ICON Payments system and the OpenRevenues system (Council tax and benefits system).

Trafford procured the C360 CRM system from Asidua in 2014, and since the original timeline was agreed, issues have been identified which delayed its full

implementation. There were issues with Asidua during the initial scoping phase: the technology was good, but Trafford did not have confidence in Asidua's ability to deliver a successful implementation. Civica bought Asidua and took over the implementation in summer 2015, and underwrote the contract.

The system was expected to be fully implemented by Dec 2016, but Civica didn't complete the implementation within the planned timescale for a number of reasons. The original project plan produced by Asidua was not based on a detailed understanding of the deliverables, activities, and dependencies, with robust estimates, and Civica were unable to deliver infrastructure and software of acceptable quality within the agreed timescales due to on-going issues with Asidua staff. Another issue encountered was that Amey did not have a suitable payments system to link with the Council CRM system. There was also additional pressure on implementation when the scope of work commissioned by Civica was increased to add an additional customer portal for GMSS.

Scrutiny Members have been assured that the change in project timescales will have no impact on the Civica costs. Since the issues have become apparent, there have been several high level meetings between the Council and Civica to drive the implementation forward. New personnel are now in place at Civica to oversee the delivery of the Council's CRM system, and Officers are confident that a capable team are in place to lead the system's implementation. It has now been agreed that the CRM system will be fully implemented by May 2018, with a detailed timeline listed below.

5. New Timeline and Approach

Between now and May 2018, Scrutiny Members have been advised that the following services are due to go live:

November 2017	<ul style="list-style-type: none"> •Comments and compliments •Complaints •Freedom of information and subject access requests
January 2018	<ul style="list-style-type: none"> •Blue Car Badges •Green waste •Environmental Services 'pay for it' •Environmental Services changes to live system (incl closure reasons)
February 2018	<ul style="list-style-type: none"> •Free School Meals •Pest control
March 2018	<ul style="list-style-type: none"> •Registrars
April 2018	<ul style="list-style-type: none"> •Licensing
May 2018	<ul style="list-style-type: none"> •Parking •Contact us and change of address / circumstances •Benefits •Business Rates •Council Tax •School Admissions

There is a support programme in place to provide regular updates and support to the Council by Civica, which will continue on completion of the system's implementation. Council staff will also receive training on how to make changes to the system to reduce Trafford's dependency on Civica when time critical changes are required.

There have been changes to Civica staffing at both senior management and operational levels, including a new Project Manager, and the project plan has been revised based on new realistic estimates for the work being completed by Civica. There have also been improvements to Civica system development and the go-live processes. Civica and Trafford have adopted a more robust approach to quality control, and an increased on-site joint working between Civica and Trafford, including a new collaborative approach to problem solving which will improve things further. This will also encourage more effective communication between Trafford and Civica.

6. Amey and CRM Systems' Interface

Members have raised issues with the current interface between Trafford and Amey systems, which are causing difficulty for some residents and Members when logging certain incidents through the online portal. This includes an issue with reporting a missed bin on behalf of a different address to your own, as well as reporting when some litter bins are full. A timetable is in place for correcting these and other identified issues, and Scrutiny have been assured that both organisations will continue to work together to resolve these. It has also been noted that the fixing of some issues required an update on Amey's systems and are therefore partly out of the Council's control.

Scrutiny Members have been advised that the update in January 2018 will allow Amey to reopen any reports closed in error, which will help to provide more accurate performance reporting. Another issue is that Amey do not currently have their own payments system, meaning the Council are processing payments on behalf of Amey. Work is ongoing to see how this can be resolved.

It has been agreed that Members will be provided with an update when any known CRM issues have been resolved.

7. Procurement Process

Members have been assured that proper due diligence was followed during the procurement process. The tender process was very thorough, and included a written application as well as multiple demonstrations and interviews. Following the long process, the decision was made to award the contract to Asidua (now Civica), as they best fit the criteria. Cost was a factor in the decision making process, meaning the Council acquired an 'off the shelf' solution. Other, bespoke options were available, but at a substantially higher cost to the Council. Although a scoping exercise was undertaken with Asidua, Officers acknowledge that this could have been a more in depth process. Members were also advised that the system is used by other Local Authorities such as Blackburn, East Riding, Redcar and Leeds Councils, so this was not a new venture for Asidua at the time.

A four year contract was initially agreed with the end date for the CRM framework agreement in September 2018 (with the option to extend). This agreement allows the Council to place new orders with Civica for the CRM, and the end dates for delivering these orders can be later than the framework agreement end date. The end date for the current system support and maintenance agreement is in June 2020.

Members are content that the appropriate due diligence was undertaken during the procurement process, however they still feel that a review of the procurement process would be beneficial to ascertain whether any lessons can be learned.

8. Liquid Logic

An interface between Liquid Logic and the CRM system is in scope for the CRM implementation, however there have been many changes to Children, Families and Wellbeing services and systems. The CRM project is currently waiting for confirmation from the Social Care Sustainability Programme to understand if there is still a requirement to provide integration.

9. Recommendations

Recommendation 1 – That the Executive Member for Highways, Parks and Environmental Services continues to work closely with Amey on improving the interface between Amey systems and the Council's CRM system to ensure residents and Members have an effective portal for reporting incidents, as well as ensuring that performance reporting is as accurate as possible.

Recommendation 2 – That the Executive consider conducting a review the Council's procurement process for large IT projects to ascertain whether any lessons can be learned following the procurement of the CRM system.

Recommendation 3 – That a further update on the CRM's implementation be provided to Scrutiny in due course, reporting on progress against the timeline.

10. Summary

The Task and Finish Group Members would like to thank the Corporate Director, Transformation & Resources and the ICT Project Manager for providing an informative presentation and answering the questions raised as part of the review. Members feel assured that the issues with the CRM system implementation have been adequately identified, and look forward to the successful implementation of the CRM system under the revised timeline and project plan.

Due to the issues encountered during the process so far, Scrutiny will continue to monitor the process and request that the recommendations in section 9 of the report be considered, and a further progress update be provided to Scrutiny in due course.