

STAFFORDSHIRE CONNECTS JOINT COMMITTEE

Friday 18th March 2011

CRM Update

1 PURPOSE OF REPORT

- 1.1. To update the Committee on progress to date with the recommendations in the report to the Committee in December under Agenda Item 6 on the future direction of CRM.
- 1.2. To approve the recommendation of the Strategic Advisory Board that the balance of any CRM team under spend from reserves approved at the Committee in December, be ring fenced to CRM.

2 RECOMMENDATION

- 2.1 To note the report on progress to date.
- 2.2 To approve the recommendation of the Strategic Advisory Board that any balance of CRM team under spend from the £17,500 of reserves set aside for additional technical resource, be retained by the CRM team for this financial year.

3 BACKGROUND

- 3.1 In the paper presented to the Committee on 17th December, Staffordshire Connects proposed a series of intelligence gathering consultation workshops in the early New Year with a mandate to:
 - Obtain a clear picture of each partner's customer access strategy.
 - Define areas of commonality and highlight significant differences in each authority's strategy in the short, medium and long terms.
 - Express any particular CRM preferences or predispositions or strategic decision at odds with the continuance of a partnership wide CRM.
 - Evaluate the CRM strategic options open to the Partnership and recommend a strategic way forward.
 - Set out an initial position on requirements.
 - Consider funding options.
 - Conduct a soft market test exercise with reference site visits as necessary.
 - Draft a statement of requirements and business case for approval by the Staffordshire Connects Joint Committee.

4 CRM WORKSHOPS

- 4.1 **Workshop 19th January 2011**
- 4.2 This initial workshop was attended by members of the Strategic Advisory Board and other key stakeholders in customer relationship management.
- 4.3 The workshop established clarity on the position regarding Oracle's support for the LG45 product.
- 4.4 After examining indicative costs for the procurement of a new partnership wide CRM system, the workshop stressed the need to fully explore lower cost options than outright procurement in the light of current economic climate.

- 4.5 Further workshops were proposed to examine whether the existing CRM platform is fit for business purposes both now and in the future. These further workshops would be used to identify gaps between partners aspirations and the present service allowing a more valid comparison of the case for exploiting the existing investment as a medium term option set against other options.
- 4.6 **Briefing to Staffordshire Chief Executives 20th January 2011**
- 4.7 The Director and Technical Manager attended the Staffordshire Chief Executives Group meeting and gave a briefing on the future strategy for CRM.
- 4.8 The Group agreed that the correct sequence was to determine what a future system needs do before identifying/further developing a specific proprietary system to do it. The overriding priority was to reduce the costs because of the current economic situation and its impact on budgets in the public sector.
- 4.9 The group also decided that those taking part in the workshops need to be the right people at the right level.
- 4.10 **Workshop 28th January 2011**
- 4.11 This workshop produced a detailed statement of requirements building on the high level scope presented to Workshop 1.
- 4.12 It identified and defined partner's requirements for CRM in the short and medium terms and categorized these into essential and desirable.
- 4.13 **Workshop 1st March 2011**
- 4.14 This workshop presented to partners the CRM gap analysis and proposals on bridging the gaps identified. As there has been a variety of responses from partners on functionality they consider essential, a joint exercise took place to set out an agreed programme of work that met partner's essential requirements.

5 CONCLUSIONS

- 5.1 The workshops have identified a programme of development work that will deliver partners core functional requirements. This roadmap is now in the process of being implemented.
- 5.2 A number of requirements were identified that require further analysis and investigation and these have been prioritised for further action.
- 5.3 Although launching a procurement process for an alternative product at this point in time is not deemed viable in the current economic climate, Staffordshire Connects and partners are continuing to look at alternatives to the Oracle LG45 system. Dialogue with other vendors and with other local authorities is continuing.

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