

STAFFORDSHIRE CONNECTS JOINT COMMITTEE

Friday 17th December 2010

Future CRM Scope and Strategy Discussion Paper

1 PURPOSE OF REPORT

- 1.1 To summarise the discussion paper sent to Strategic Advisory Board and approve the Board's recommendations on the scope and future strategy for a partnership wide CRM system and the approach and timetable to adopt.

2 RECOMMENDATIONS

- 2.1 That the Joint Committee:
- (i) Approves the project approach and timetable as set out below.

3 CONTEXT

- 3.1 The present CRM hosting agreement expires at the end of 2013 so consideration needs to be given now for a CRM strategy for the period post 2013.
- 3.2 Because of their own wider strategic agendas, some partners need to move with the procurement of a replacement CRM system for implementation far earlier than the 2013 deadline. The implication behind this is that if the Partnership wishes to continue with a pan-Staffordshire partnership wide CRM, then this will likely need to be phased in over a period with individual partners moving at their own pace.
- 3.3 The Oracle software product (LG45) is no longer a market leader. Oracle themselves now promote an alternative product from their portfolio and have long since ceased to invest in the LG45 product. The numbers of local authorities using the LG45 product is dwindling.
- 3.4 Considerable time and resources are being put into LG45 developments which are only bringing the specification of the system up to that delivered by commercial off the shelf products from today's CRM vendors.
- 3.5 Irrespective of what aspirations have or haven't been delivered by the existing CRM system, the concept of having a single system across the county is of great benefit to partner authorities. A joint CRM is the critical enabler for enhanced two tier and joined up working within the Staffordshire authorities.
- 3.6 We should also not lose sight of other benefits from a joint system:
- It provides the glue that can bond services together.
 - It provides a ready means to integrate other public sector bodies who operate in jurisdictions that cross boundaries.
 - It considerably eases the path to shared services.
 - It facilitates sharing of best practice in service delivery.
 - It shares out the purchase, development and support costs. Additionally, purchasing as a consortium should provide the Partnership with rates and conditions not available to an authority purchasing on its own.
- 3.7 Staffordshire Connects partners are being asked to consider strategic options for CRM
- 3.8 To continue with the Oracle LG45 system post 2013 by extending contracts.

- 3.9 This approach has advantages in that it avoids incurring the initial set up costs and the disruption of implementing a new system and also enables the original aspirations to be fully realised.
- 3.10 Set against these are clear disadvantages the major one being that some partners will go their own way with their own alternatives to Oracle LG45. Although separate CRM systems could still share a common customer data set, realising all the original aspirations would be difficult to achieve when partners are deploying separate CRM systems.
- To procure a new commercial off the shelf CRM product and bring partner authorities on board in a phased implementation approach.
 - This runs the risk of losing some of the development investments in the current system but would enable partners to deploy state of the art technologies.
 - Work collaboratively with another authority by extending their existing system.
- 3.11 This approach is likely to be the most economically advantageous but would need technical matters like scalability, security and network provisions to be addressed.

4 APPROACH AND TIMETABLE

- 4.1 Because at least one partner has the imperative to procure a replacement CRM system in the next financial year, a fairly aggressive timetable is being proposed. By the end of February 2011 to have a statement of requirements ready that can form the basis of an invitation to tender or any alternative to procuring a commercial product.
- 4.2 The implementation of a successful CRM system is reliant upon well planned customer relationship strategies that reflects partners short and long term objectives. As such, it is more than just a technology project and also needs focus and input from customer services, business transformation, financial officers, front line users groups, IT departments and others.
- 4.3 Staffordshire Connects is proposing to its partners that a series of intelligence gathering consultation workshops take place 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.
- 4.4 Depending upon the outcomes of these workshops, it is anticipated that the partnership would be engaging with a formal procurement process at the beginning of the next financial year.

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