

Title: Introduction of a Customer Relationship Management System
 Lead Officer: David Elkington (david.elkington@warwickdc.gov.uk)
 Portfolio Holder: Councillor Jessica Harrison
 Wards of the District directly affected: None

Approvals required	Date	Name
Portfolio Holder	09/01/2024	Jessica Harrison
Finance	09/01/2024	Andrew Rollins
Legal Services		
Chief Executive	09/01/2024	Chris Elliott
Deputy Chief Executive	09/01/2024	Darren Knight
Director of Climate Change	09/01/2024	Dave Barber
Head of Service(s)	08/02/2024	All
Section 151 Officer	09/01/2024	Andrew Rollins
Monitoring Officer	09/01/2024	Graham Leach
Leadership Co-ordination Group	21/02/2024	
Final decision by this Committee or rec to another Cttee / Council?	Yes	
Contrary to Policy / Budget framework?	No	
Does this report contain exempt info/Confidential? If so, which paragraph(s)?	No	
Does this report relate to a key decision (referred to in the Cabinet Forward Plan)?	Yes, Forward Plan item 1413 scheduled for 06/03/2024	
Accessibility Checked?	Yes	

Summary

This report discusses the introduction of a Customer Relationship Management (CRM) System to support the delivery of services as a cornerstone technology for the forthcoming Change Programme.

The purpose of a CRM system is to provide a centralised platform to handle, track and manage customer requests across multiple contact channels. It also provides the foundation to make it easier for residents to contact the Council and access services and, to improve service consistency, performance and accountability.

Recommendation(s)

- (1) That Cabinet support the report content.
 - (2) That Cabinet support the recommendations to procure the Jadu CRM system and implement this as part of the Council's Change Programme.
 - (3) That Cabinet delegate authority to the Head of Customer and Digital Services in consultation with the Transformation Portfolio Holder to procure the Jadu Connect CRM system providing the costs are within 10% of those indicated within the report.
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1 Reasons for the Recommendations

1.1 Introduction

- 1.1.1 Warwick District Council's vision is to make the district a great place to live, work and visit by improving lives and our environment. The Council's customers are at the heart of this vision, through its desire to provide excellent services that are responsive, accessible and offer value for money.
- 1.1.2 Customer contact is a challenging operation for the Council. Demand for Council services has consistently grown year on year and whilst the resources to meet these needs have (in some instances) increased too, it has not been proportional. Equally, the method by which services are delivered have not significantly changed, whilst the environment within which they operate has.
- 1.1.3 At least 210,000 customers contacted the Council by telephone in 2023. Online forms accounted for 27,665 requests (for the year) and in the last six months of 2023, there were some 372,516 unique visitors to the Council's website. This does not however account for the Council's entire contact footprint as services may have been contacted directly (outside of the monitored telephone system) or used methods such as email or social media.
- 1.1.4 Some interactions were purely for information, but most sought to resolve some kind of issue that required the Council to intervene. Regardless of purpose however, opportunities to improve our services exist for most of our interactions.

1.2 Current Issues

- 1.2.1 *Tracking, Performance and Accountability*
- 1.2.2 If any service area were asked to provide precise data for the entire number of customers who've contacted them and received a full response to their

query, they would only be able to provide an estimate.

1.2.3 The Council currently has limited capability to holistically track customer outcomes or measure transactional performance across every aspect of customer delivery within services. All services have scope for requests to be missed or for outcomes to take an indeterminate amount of time.

1.2.4 These are not intentional failings or disregard for customers within service areas, they are simply consequence of how customer demand is met. Figure 1 for example shows the ways a customer can get in contact with the Planning, Conservation, Land Charges and Building Control teams, based on the contact us links from one page of our website. Virtually every method of contact provides some opportunity for a request to be omitted from the services case management software and therefore, for a request to be missed. 1571 calls were directed to Development Services in 2023, but this doesn't count demand from direct contacts to 34 of the 35 numbers published on our website.

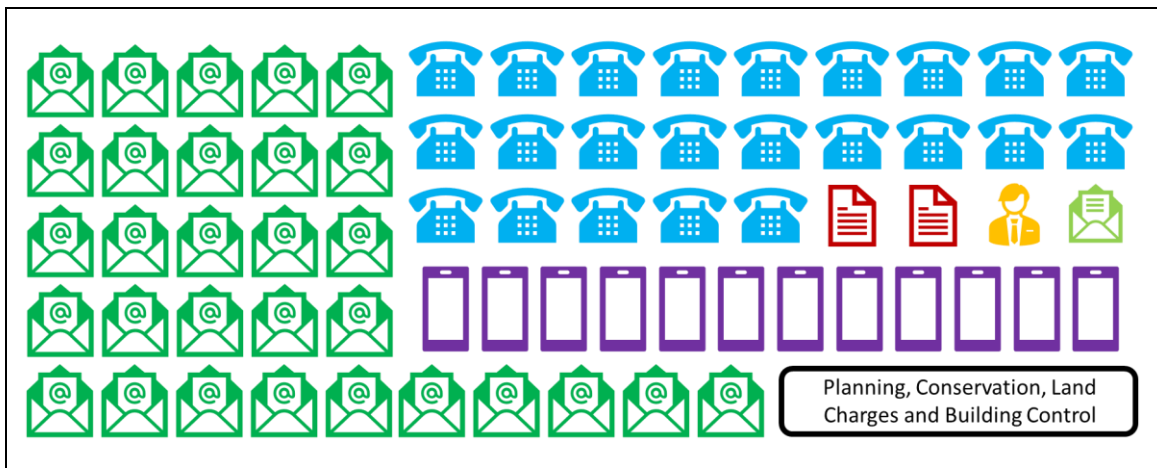


Figure 1. Contact Methods for the Planning Team

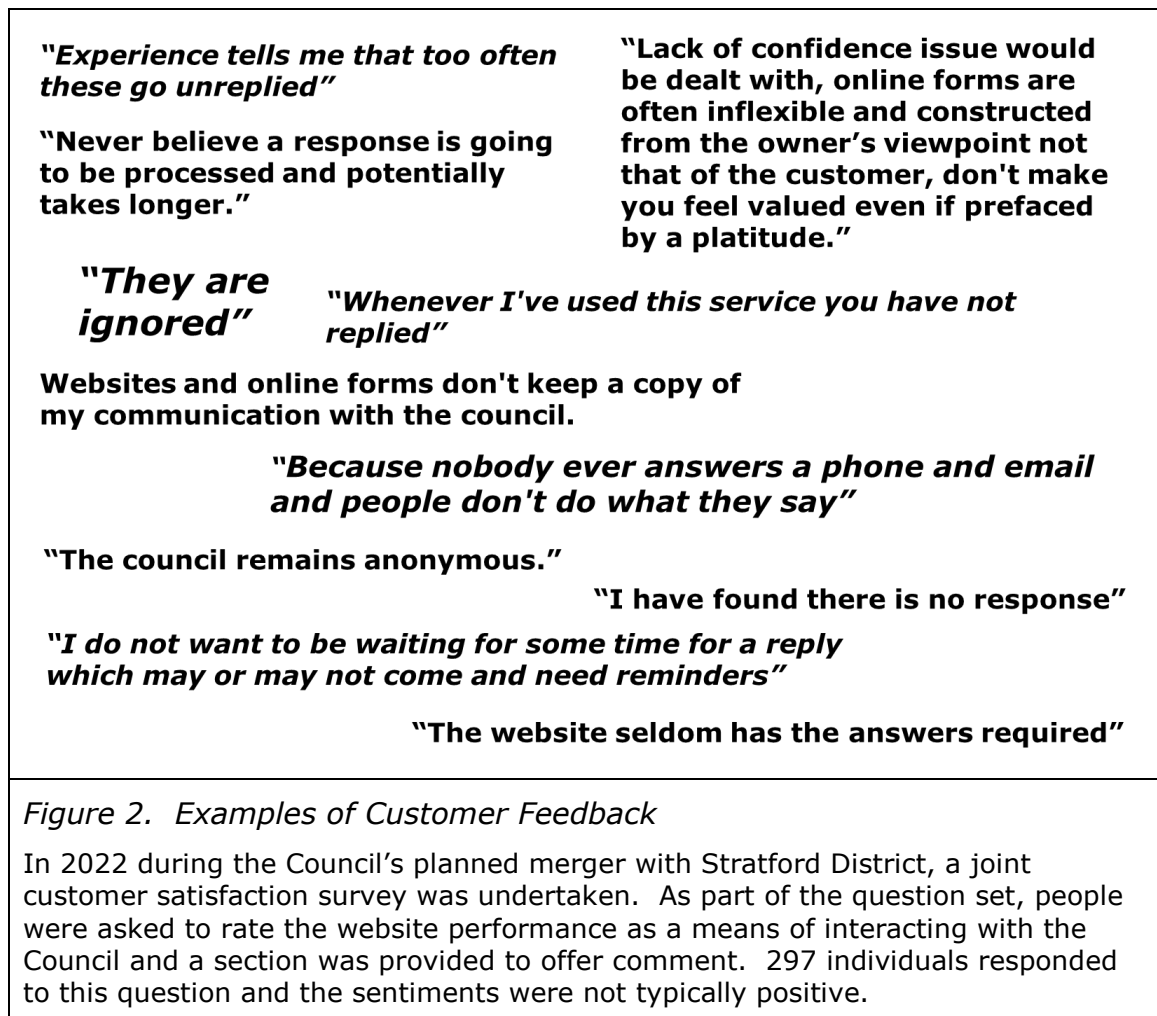
From the [Planning Home Page](#) on WDC's website, there are two links in the Contact Us Section. From these two linked pages and going no deeper into the website that a further link (3 levels) it was possible to identify 30 email addresses, 23 landline phone numbers, 12 mobile phone numbers, two online forms, one mailing address and one face to face method to get in touch with the service. This is not including the online methods such as through the planning portal or the Council's own online planning interface for comments and queries.

1.2.5 Many of the Council's webforms exacerbate this problem, as they simply result in an email being sent to a service mailbox and intermingled with other emails sent directly from customers. This approach does not provide any mechanism for monitoring whether a request has been resolved, how fast it was dealt with and provides limited accountability; multiple people can access a mailbox without specifically being responsible for completing an action.

1.2.6 A 2022 customer survey conducted in conjunction with Stratford District Council identified concerns amongst residents that requests they had raised were not followed up; resolutions were not reached and requests for call backs were unfulfilled. Some of this feedback is highlighted in Figure 2.

1.2.7 The question presented asked customers to elaborate why they rated the Council's online services poorly (so there is bias). However, 297 individuals

offered comment on this question, which was more than any other section of the survey.



1.2.8 *Contact Channel Silos*

1.2.9 Presently, the Council's online forms, telephony, social-media, and face to face operations are all independent. Whilst services may work together, there is no global visibility of a customer's interactions; an exchange initiated via X (formerly Twitter) for example, which is received by the Media team, cannot be seen by an officer dealing with the customer over the phone.

1.2.10 This approach makes it virtually impossible for a customer to easily transition between one communication channel and another as their information exists in isolation. It also creates significant limitations on the ability to provide customer updates, particularly if information is held in service specific software or mailboxes with restricted access.

1.2.11 WDC has no point of confluence where customer contact comes together. An example of this is shown in figure 3, which illustrates how Customer Services would obtain service feedback for a customer. The dispersal also contributes significantly as to why the Council's website has more than 80 different telephone numbers published and 132 contact email addresses (figure 4). The use of generic emails was actually discussed by the Council [in 2015](#) and it was agreed at the time to phase this practice out. Since then, the number of generic mailboxes has actually grown.

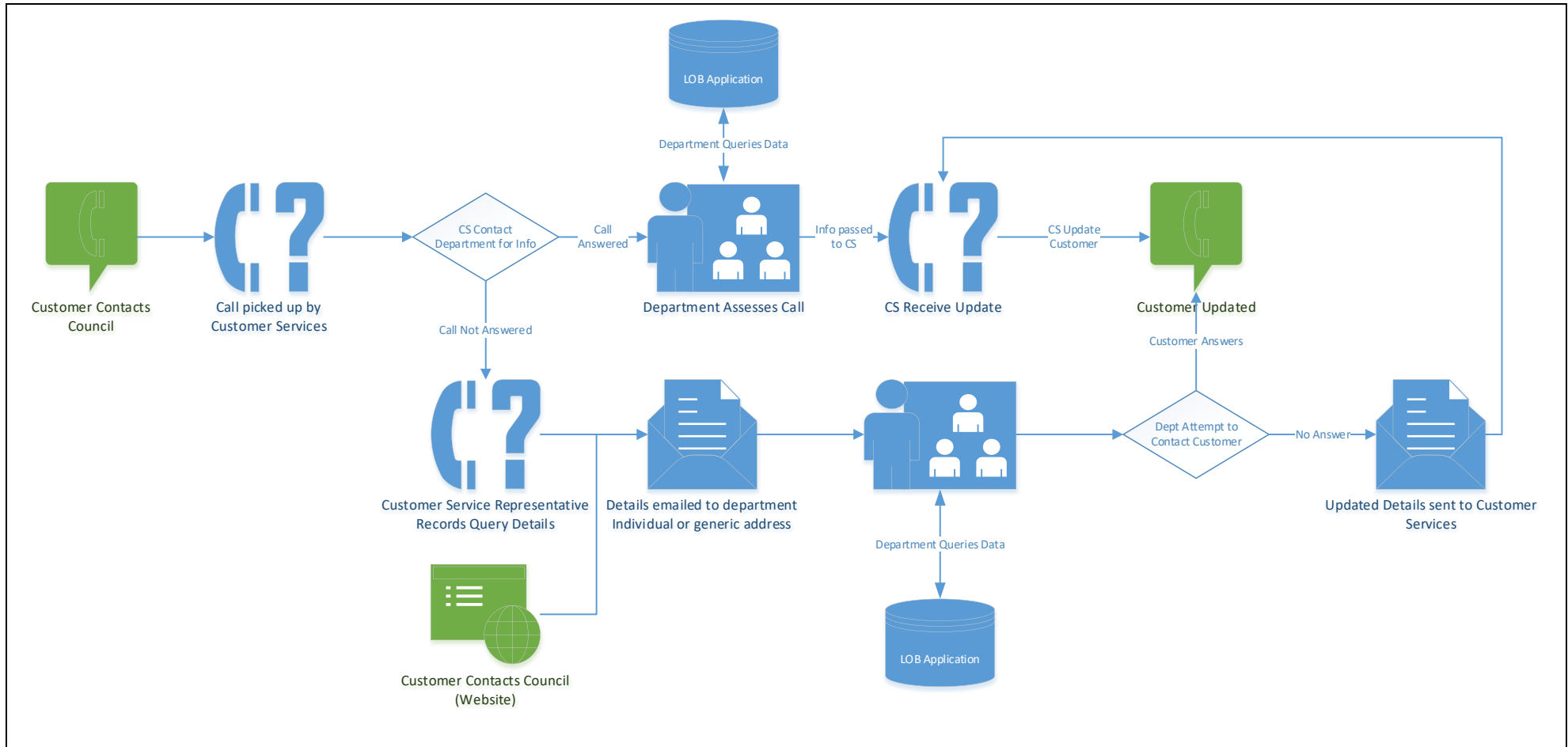


Figure 3. Obtaining a Customer Request Update

The Council’s Customer Service team typically function as a full point of contact for face-to-face contact, but not phone or online. The process above is a simplification of what happens currently if a customer requests an update on a service they have requested previously – but this could easily be true of a new request too. As there is no central repository of information, much of the progress chasing process is manual.

Customer Services must essentially try to find “who” is dealing with a query within a service. They may attempt to put a customer through to the service, but if there is no answer, they may collect some details and ask the service to contact the customer. Assuming a customer can be connected, or a query email is sent, the department may then assess the call, query data held in local systems and provide an update. Information may also be directed back to customer services too.

elections@warwickdc.gov.uk	22
parking@warwickdc.gov.uk	13
planningenquiries@warwickdc.gov.uk	11
privatesectorhousing@warwickdc.gov.uk	11
events@warwickdc.gov.uk	10
media@warwickdc.gov.uk	10
J*****.*****@warwickdc.gov.uk	9
benefits@warwickdc.gov.uk	8
committee@warwickdc.gov.uk	7
enterprise@warwickdc.gov.uk	7

Figure 4 – Top 10 Reused Email Addresses

As of April 2023, there were 132 email addresses published on the Council's website as a means for the public to contact WDC. The list above shows the top 10, which also contains the name of an individual officer (J**.***), who appears on nine individual pages.

It is not uncommon for organisations to publish email addresses as a means of contact, but these tend to be limited to specific purposes. Using email as a means of interaction often causes problems, unless it is from within a system that can record a complete customer interaction. WDC does not have this facility available.

1.2.12 *Service Contact Silos*

- 1.2.13 Most services within the Council have their own independent contact teams. There is no centralised point of contact nor is there any consistent method of recording interactions. Some services may enter data into a line of business application, others may not. Some may use dedicated officers to deal with customers whilst others may deploy their entire team on a cyclic basis. Each area approaches providing customer service in a slightly different way.
- 1.2.14 There is also the potential for highly skilled staff to be deployed in dealing with low level queries, which do not require their expertise. For example, it would be entirely possible for a senior member of the building control team, whose number is published on the website, to be contacted directly by a customer to organise a visit. Whilst for the customer this a good outcome, that same outcome may have been achievable online (with no officer interaction) or via a significantly less costly resource.
- 1.2.15 An example of how this model of delivery can differ between services is shown in figure 5. An example of how the scenario described above may be possible can be observed by visiting www.warwickdc.gov.uk/contactus and following the link for [Building Control](#).

How demand is met...

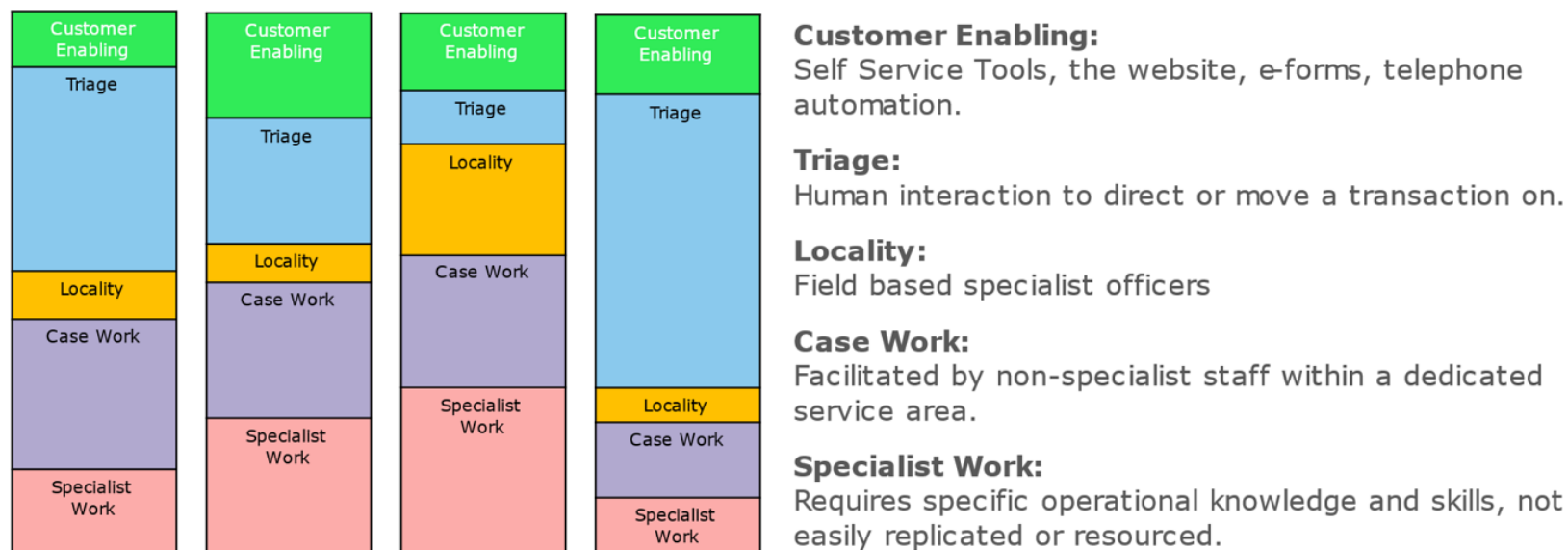


Figure 5 – Customer Contact Silos and Demand Management

Some services have put significant effort into their online presence which enables customers to help themselves. But this is not consistent and across all service areas there are a limited number of fully automated transactions.

This inevitably leads to greater levels of triage, where human interaction is required to move a service along. That may be answering a phone call, reading an email or getting back in touch with someone to find out more information. This need to triage may also affect the distribution of staff resources, drawing in more highly trained specialist officers to deal with relatively low-level fulfilment tasks. The knock-on effect impacts on the service's ability to deal with cases or actual specialist work that requires the attention of specific officers.

The example is for illustrative purposes and does not scientifically relate to any specific service. In some services, lots of triage may be appropriate and locality or specialist work may simply not be a part of their function. But to be sustainable the Council must make the best use of the resources it has, and this model of delivery does not achieve that.

- 1.2.16 *Digitised, not Digitalised.*
- 1.2.17 The Council currently has over 100 online forms and these typically create an email which contains data an individual has entered. There are some benefits to this (such as only collecting the information necessary) but this approach is extremely limited.
- 1.2.18 The current forms do not represent the digitalisation of services, but simply the digitisation of data – at best. They still require someone to do something with the information gathered (including rekeying) unlike a truly digitalised process where an action would commence as soon as data entry was complete.
- 1.2.19 The Council does have some good examples of fully digitalised services. Several Revenues and Benefits online forms integrate directly with the back-office system and result in processes starting upon submission. The Council’s work with Stratford District Council for the waste service is a further good example where, as shown in Table 1, some 55,000 garden waste permits were processed over 12 months, largely without any human intervention.
- 1.2.20 In July 2022, 14,351 garden waste permits were issued by WDC. 13,535 of these were issued online which means that all customer data, payment information, the registering of a new subscription with the waste contractor, the issuing of a new container (if needed) and the production and dispatch of a subscription sticker, was entirely automated. Residents could complete this transaction any time they wanted, using a device of their choice.

	<i>Online</i>	<i>App</i>	<i>Telephone</i>	<i>% Demand Met Digitally</i>
<i>Garden Waste</i>	<i>55595</i>	<i>0</i>	<i>4179</i>	<i>93.01%</i>
<i>Missed Collections</i>	<i>13253</i>	<i>3260</i>	<i>3325</i>	<i>75.4%</i>
<i>Bulky Waste</i>	<i>2028</i>	<i>0</i>	<i>240</i>	<i>89.42%</i>
<i>Total Across All</i>	<i>70101</i>	<i>3260</i>	<i>11775</i>	<i>86.17%</i>

Table 1. Waste Service Demand by Channel

The summary above highlights the different channels used by Customers to interact with the Council’s waste service. These processes are all fully digitalised and carefully designed automation ensure that information collected by the Council is passed to the contractor in a timely way, without the need for manual intervention. Each process also has several checkpoints, which ensure demand is managed appropriately.

Data collected between June 2022 and May 2023. Represents jobs logged within CRM, not total calls answered/offered.

- 1.2.21 Just 816 subscriptions were processed by the contact centre. If each of these interactions took 8 minutes to complete, that is roughly the equivalent of a full-time staff member, working flat out for three weeks. To handle the 13,535 permits issued online via the phone, had the website not been

available, would have required 12 staff over the same period. That assumes no one takes a toilet break, works on nothing else, without distraction, without refreshments, and all requests take 8 minutes –which is of course completely implausible.

1.2.22 **Service Centric, Not Customer**

1.2.23 A lot of our existing digitisation work focuses on the needs of the service and its existing/historical processes rather than being designed around our customer's actual need. This can result in complex and clumsy service interfaces that are not as user-friendly as they could be.

1.2.24 Our systems provide limited feedback initially and typically none throughout the process lifecycle. This does little to encourage self-sufficiency, reassure customers or prevent further repeat contact where a customer is seeking nothing more than reassurance that their request is progressing. This is commonly referred to as "progress chasing" and is a form of contact that can easily be avoided.

1.2.25 We also typically do not involve Customers in the decision-making process or seek their input when it comes to designing the services they will ultimately use. This can result in a disconnect between the outcomes that the Council wishes or expects to achieve and the services that our customers need, leading to dissatisfaction and mistrust.

1.3 **Proposal - Introduce a Customer Relationship Management System**

1.3.1 Customer and Digital Services propose that as a cornerstone technology to underpin the Council's forthcoming Change Programme, a new, modern, low code Customer Relationship Management (CRM) system is introduced.

1.3.2 *What is a CRM and Low Code?*

1.3.3 At its most basic level, a CRM is a case management platform.

1.3.4 A customer starts their journey by submitting the details of what they require through a structured mechanism, which is then recorded in a database. From there workflows are triggered according to the service requested and the outcome is returned to the customer upon completion.

1.3.5 A record of the interaction is stored within the CRM, which can be accessed should a problem recur or require investigation. Interactions are visible to both staff (with appropriate access) and customers, from their own secure, online portal. Customers can use a variety of mechanisms to submit their information including online via the Council's website or app, and other "offline" channels such as telephone or face-to-face. A simplified example of this operation is shown in figure 6.

1.3.6 The CRM can provide a wealth of information to services, and accurately records the existence and status of any inbound query, forming a complete picture of any customers interactions across services. It can also be used to assess service performance, highlight potential problems, improve customer understanding and provide insight to support decision making.

1.3.7 Modern CRM systems do not require the level of technical expertise that was historically needed to make a system work. Rather than having services hand-coded in a traditional programming environment, processes, forms and interactions can be built in a simplified development space, using drag and

drop interfaces. This is known as low code.

- 1.3.8 Intuitive tools allow users with no formal knowledge of coding or software development to create applications for many purposes such as mobile business apps, robotic automated processes, and solutions based on the application of artificial intelligence. Low Code platforms have become increasingly popular as a fast and easy alternative to traditional software development.
 - 1.3.9 Both professional developers and “citizen developers” (non-professional developers) can use a low code platform to create apps of varying complexity to meet business demands. Developers can also share their work, and a solution that has been developed by one authority, can easily be adapted to meet the specific needs of another. This again helps to reduce the time it takes for positive benefits to be realised and improvements made. Things can of course still go wrong, so careful testing will always be required for any development, low code or otherwise.
- 1.4 *Which CRM?*
- 1.4.1 Under this proposal, the Council would introduce the Jadu Connect Customer Relationship Management system. The platform is a highly capable, cloud based, low code solution, providing comprehensive functionality and delivery options across multiple contact channels.
 - 1.4.2 Whilst there are several alternative CRM systems available within the Local Government market, Jadu Connect is part of a wider software ecosystem, which the Council already partly uses. The Council’s content management system and existing e-forms solution are both Jadu products (Jadu Central) and the Connect CRM component integrates directly with these.
 - 1.4.3 The system includes integrations for underpinning services such as email and text messaging (for customer updates), our e-Payments solution, the local land and property gazetteer and connectors to 3rd party applications used by services and suppliers.
 - 1.4.4 Jadu Connect also facilitates an authenticated, secure online customer portal, which can be used to provide onward authentication for other online Council services, without the need for separate passwords and identities.
 - 1.4.5 Where the system is used to support services that already have specific line of business application (such as regulatory services who currently use Civica APP), in the short term, instead of trying to replicate and replace the functionality of those systems, the CRM will use integration interfaces to seamlessly push and pull information back and forth.
 - 1.4.6 This significantly eases the introduction of the CRM, as back-office services won’t typically need to learn how to use the system – they simply continue with what they have. It will also benefit Customer Services, who only need to learn one system rather than multiple line-of-business applications to deal with a wider range of queries.
 - 1.4.7 Longer term, it will be possible to replace some line of business applications with CRM workflow equivalents. This will however take time and will only be possible once the Change Programme has been established. Examples of where Councils have used the Jadu CRM to replace functionality of legacy applications can be found on their website at <https://www.jadu.net/directory/2/library/category/12>.

1.4.8 For services that do not have a dedicated application to handle their work, the CRM can be used instead. The CRM includes free licences that enable teams or suppliers to access a work management portal. This would provide information about outstanding tasks, prioritised accordingly, and provide facilities to update jobs, seamlessly updating the CRM and (potentially) informing the customer. This would avoid the need to email contractors or internal contacts and provide far greater visibility of workloads and progress.

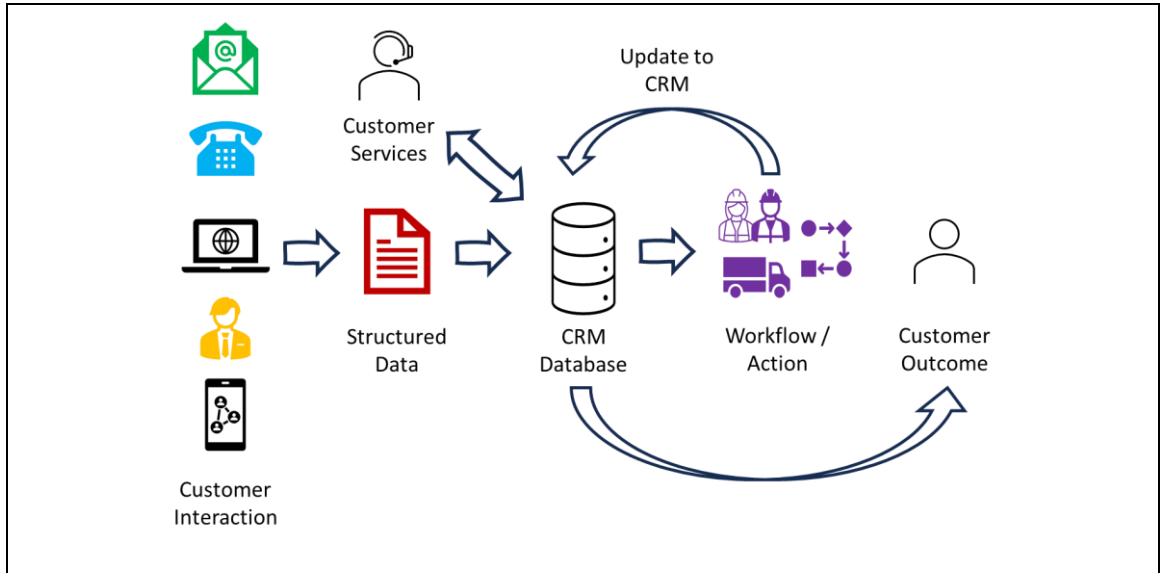


Figure 6. Simplified Example of a CRM

A customer interaction can start via any channel, collected as structured data (Jadu Forms) which can be presented to the CRM database (Jadu Connect). A workflow engine will trigger an action such as passing the job to a contractor, and when actions are taken, the CRM is updated, as is the customer.

1.4.9 To ensure the Council realises the most benefit from the CRM as soon as possible, it is expected that the timetable shown in Figure 7 will be observed.

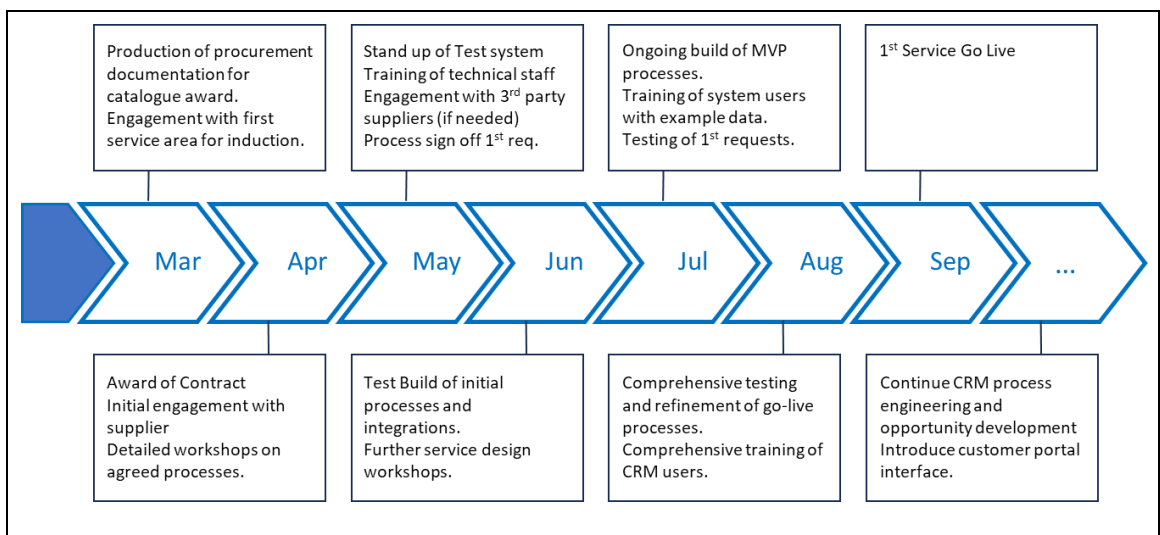


Figure 7. Potential Implementation Timetable

The implementation of the CRM will be a continuous process. However, within the first six months, it is expected that our first digitally enabled services will launch.

1.5 **Typical Benefits of a CRM**

1.5.1 *Improved Accessibility and Transparency*

1.5.2 By using a CRM, our customers will be able to access enhanced council services through our website, mobile app, and self-service provisions. This will help to ensure that customers can engage with the council at their convenience, whenever, wherever and however they choose. This could potentially reduce demand for other channels (such as telephone and face-to-face) which are typically only accessible during office hours on weekdays.

1.5.3 Additionally, customers will be able to submit service requests, report issues, and track progress in real-time through the introduction of an authenticated online portal. This transparency and accountability could ultimately help to build trust and confidence in the council's capacity to address customer concerns promptly, leading to improved satisfaction. It would also reduce the likelihood of queries being left unresolved.

1.5.4 *Holistic Customer View*

1.5.5 Introducing a CRM will enable the council to develop a holistic view of each customer, such as their typical service needs, communication preferences and historic interactions. Such comprehensive understanding may empower council staff and services to provide personalised and timely assistance, resolving queries and concerns more efficiently.

1.5.6 The CRM will also act as an aggregator of requests, meaning that a journey which is commenced via one channel can easily be picked up via another. A customer's journey would be significantly more consistent as the processes used to manage an interaction that began online for example, would be the same as those used by a customer service officer over the phone or face-to-face. This would virtually eliminate channel and service silos.

1.5.7 *Case Management and Prioritisation*

1.5.8 The CRM system will enable the council to manage all customer cases effectively, including inquiries, complaints and service requests. This case management capability would eliminate the possibility of customer queries being left unresolved as each service would ultimately have a constant, real-time view of outstanding caseload. Unless a query was dealt with it would remain outstanding.

1.5.9 As shown in figure 8, this enhanced case management could also significantly improve how Customer Services deal with enquiries – particularly those chasing progress. In contrast to figure 3, not only is the finding of information much more efficient, but the customer could do it for themselves.

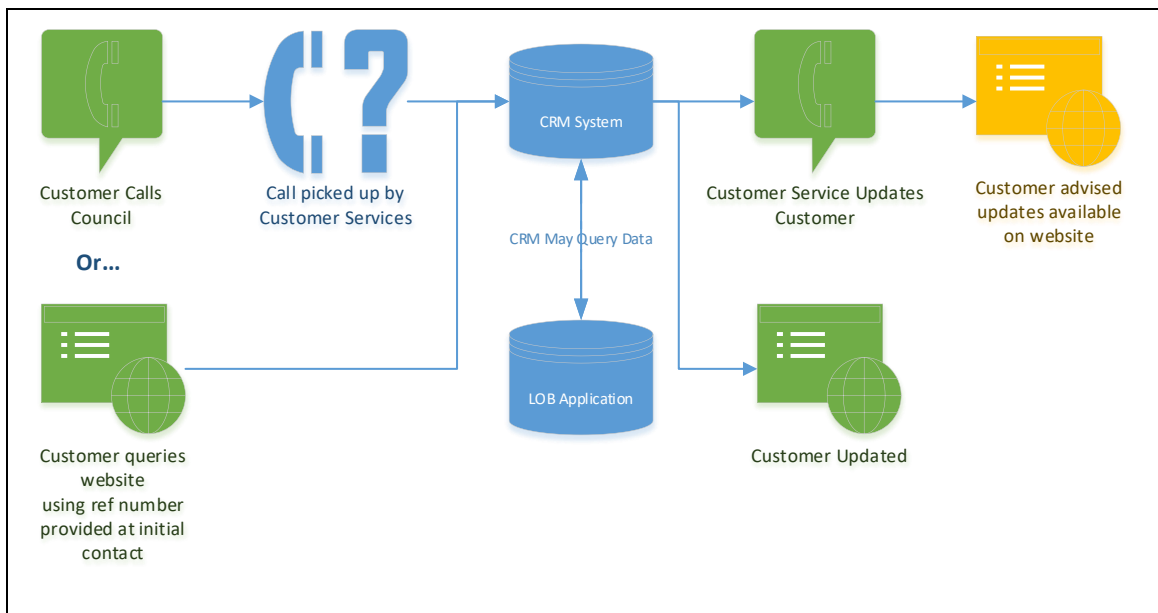


Figure 8. Obtaining a Customer Request Update with a CRM

With a CRM in place, the Council's customer services team could easily update a customer on the progress of their request. They would simply look in the CRM, if necessary, the system would then query any back-office application autonomously, and the customer service agent would simply have to repeat the information. The customer could, if they wanted to, do this for themselves on the Council's website.

- 1.5.10 The centralisation of case management data also means that staff will be able to collaborate much more effectively. If for example a customer contacts the Council to ask what is happening with their request, that information would be readily accessible, seamlessly and efficiently. This could help services to prioritise tasks, set realistic timescales for resolution and improved demand management, as less staff and customers "chase updates".
- 1.5.11 *Improved Automation and Resource Planning*
- 1.5.12 In time, the data contained within a CRM system would help the council to more accurately forecast service demand, allocate resources and optimise workforce scheduling. This would facilitate a more proactive approach, ensuring that the council could meet customer expectations and maintain service quality, but also minimise operational costs.
- 1.5.13 The waste service as shown in table 1 is a good example of this, which experiences significant peaks in demand for Garden Waste subscriptions at certain times of the year. By using the CRM, not only is it possible to gather information about how customers are completing transaction, but also when. From this data, it is easy to forecast that calls peak between April and August, so if more resource was required to meet demand, it would only be short term.
- 1.5.14 Enhanced automation and digitalised processes would also facilitate the CRM system eliminating manual and repetitive tasks. Ultimately this may free up staff time, allowing them to focus on higher value activities, such as engaging directly with customers who have greater need, problem management processes to resolve repetitive issues and service development.
- 1.5.15 It may also of course also mean that in some instances, fewer staff are

needed to meet demand. Where this happens, the Council may have an opportunity to make savings by redistributing or retraining staff into other roles (avoiding additional recruitment) or by retaining the post. Options to deal with such situations will be comprehensively worked on as part of the Change Programme, in conjunction with the Council's Human Resources team and staff unions.

1.5.16 *Decision Making, Performance Monitoring and Better Communication*

1.5.17 A CRM system will ultimately capture large quantities of customer data, providing valuable insights into preferences and service demand. When combined with other sources of information, these insights may enable the council to make better informed decisions. This could result in service improvement, better resource management and more informed policy.

1.5.18 The CRM will also be a hive of performance information that can be used to evaluate how effectively services are delivering for customers and as an early warning mechanism if customers are experiencing problems. Any data recorded in the CRM can be used to measure performance, both retrospectively as generated reports and, in real time through performance dashboards. Reports can be easily automated and could range from very generalised data across the whole council, to granular details for a specific service request, service area or geographical zone, such as a ward.

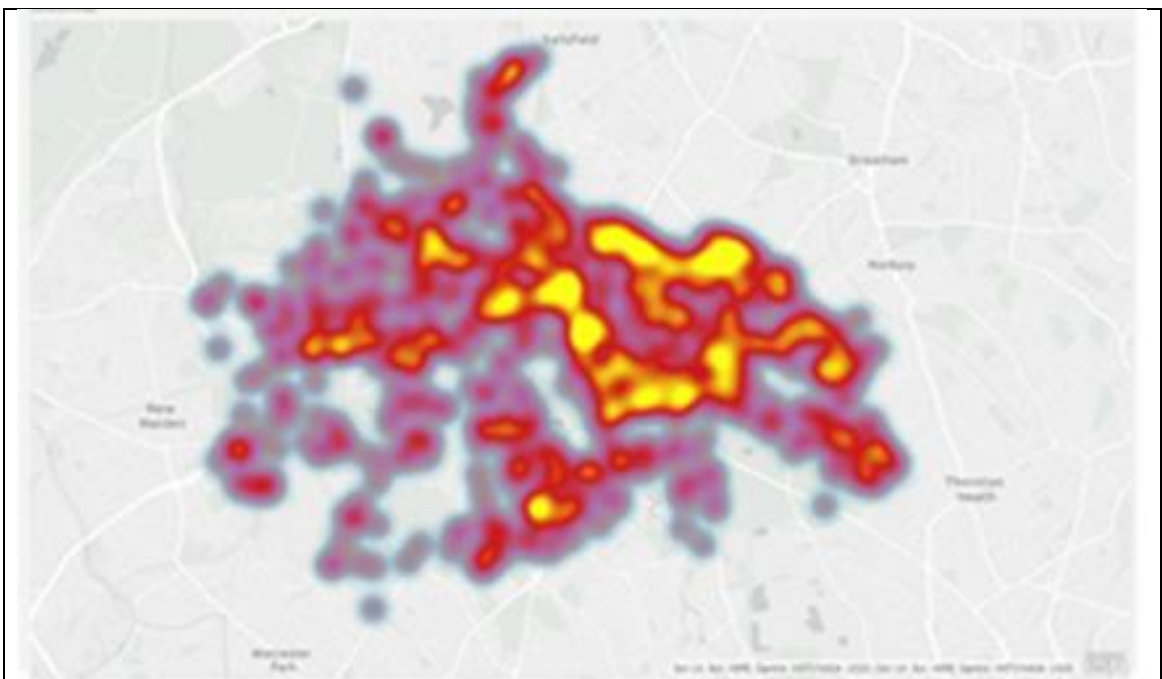


Figure 9. Heat Map of Fly Tipping

This heatmap shows the location and frequency of fly tipping incidents across an area. It was generated by data collected in a CRM, linked to a geographical location using an address and then presented as a map. It is a highly efficient way of illustrating data in an easy-to-use format, that WDC cannot currently achieve in a dynamic, automated way.

1.5.19 An example of how CRM data can be used to gain insight is shown in Figure 9, where Merton Borough Council use CRM data, combined with address data from its Local Land and Property Gazetteer to produce a heat map of fly

tipping across its geography. Whilst this is by no means a new reporting technique (the source document is nearly five years old), it is highly informative. This would not currently be easily achievable for WDC as an interactive report, because of how we collect service interactions.

- 1.5.20 The insights gained from the CRM may also allow the Council to greatly improve how it communicates with customers – allowing us to personalise messages with relevant information based on the customers desires and past behaviours. Importantly, unlike commercial organisations where the goal is to generate profit, our goal is to enhance the wellbeing of our communities and empower our citizens to make the best use of our services.

1.6 **A Past Legacy**

- 1.6.1 Warwick District Council has previously attempted to implement two CRM systems; starting with Siebel (independently) and following with Northgate Customer Access (as part of the Warwickshire Online Partnership). Neither of these systems were entirely successful (evidenced by the fact that we no longer have them) and were hampered by typical problems of their time:

- *Fragmentation*

Early CRMs struggled with integration as they were typically siloed with limited options to push data in or out. Other line-of-business applications also had these limitations, hindering data sharing, collaboration and the ability to provide seamless, integrated services.

- *Resource*

Implementing and maintaining early CRM systems incurred substantial costs and specialist resources. Budget constraints were often a limiting factor, but particularly during the period of austerity, starting with the 2008 financial crash.

- *Effecting Change*

The Council's previous CRMs weren't intended to transform services but instead to transform access. This was quite successful but was ultimately not enough to create lasting benefits as the outcomes were simple another route into a service.

- 1.6.2 The legacy of those systems is still present in the Council today and must be overcome. The CRM implementation project will have to carefully consider how it is introduced to services, ensure that delivery is "end to end" and that tangible benefits are identified and delivered as part of a planned roll out. This will not be easy, but it is necessary.

2 Alternative Options

2.1 Do Nothing

- 2.1.1 The Council is under no obligation to improve its services for Customers or to improve the way that it records and assesses performance. There is no requirement for automation to be introduced or for the Council to integrate its website with back-office systems any further than it already has. As such, the Council could continue as is and in the short term, it is unlikely there would be any significant issues.

- 2.1.2 However, this approach would also stifle the Council's progress in any form of digitalisation. There would be no effective platform to build automation from,

no way to enhance our customer journey and enable self-service and no way to quantifiably measure the value and performance of the services we offer.

- 2.1.3 Customers also expect organisations to be able to facilitate interactions digitally, in an efficient and complete manner. Presently, we can only provide limited digital services, and this does nothing to encourage self-sufficiency. Our Warwick District Council app for example only has one type of interaction available and at present we have no means to improve the offer. This is a huge, missed opportunity to offer a better service for our customers, that would ultimately also help us.
- 2.1.4 Given the pressing need for the Council to support its MTFs, establish a firm financial footing for the future, the expectations of our customers and our desire to deliver high quality, value for money services, doing nothing is not viable or sustainable.

2.2 **Consider an Alternative CRM Platform**

- 2.2.1 There are several CRM platforms within the marketplace that would be accessible and suitable for Warwick District Council. Most of these, like Jadu would be cloud based, low code solutions that offer varying levels of integration with back-office systems and would meet the needs of our customer service teams.
- 2.2.2 However, the Council is an existing Jadu customer and has already made a significant investment in our website and e-forms systems (Jadu Central). No other provider can offer an alternative CRM system that would integrate with our existing Jadu Central solution with the same granularity as Jadu Connects.
- 2.2.3 Our teams within both Media and ICT are familiar with the Jadu platform which will significantly flatten the learning curve and speed up our deployment – allowing us to benefit sooner.
- 2.2.4 For these reasons, we believe the Jadu platform offers the best fit to meet our needs and can be introduced at a competitive price.
- 2.2.5 If this approach was not acceptable to the Council, we do have the option to go out to the market and fully explore what is available. This would impact on our ability to start the Change Programme and would likely take six to nine months to complete an exercise.

3 **Legal Implications**

- 3.1 There are no specific legal implications beyond those identified for data protection, within this proposal. Procurement can be achieved through a pre-tendered Crown Commercial Services framework, that facilitates direct awards where there is already a justifiable connection to an existing system.

4 **Financial Services**

- 4.1 To introduce the Jadu Connect solution, a procurement exercise must be undertaken.
- 4.2 Our Procurement Team have recommended the use of the G-Cloud 13 framework and it is anticipated that costs of approximately £218,050 would be incurred to introduce the Jadu Connects CRM, based on a four-year

contract. These costs would include:

- 20 Licences for Contact Centre Staff
- Establishment of a hosted live and test environment
- Environment configuration and styling
- Integration with our e-Payment solution
- Integration facilities for other line of business systems, including ePayments
- Technical training for staff
- Support to build and deliver our first two case types
- Implementation, project support and testing

- 4.3 Year one costs specifically for the CRM will be approximately £71,500, which can be funded from Customer and Digital Services Digital Seed Budget. A contingency of approximately 10% of the year one budget should also be considered (£7150) and is included in the figure above.
- 4.4 On-going revenue costs of approximately £39,800 would need to be accounted for as part of Customer and Digital Services revenue budget from 2025/26 onwards. This will require a growth request to be submitted at the appropriate point.
- 4.5 Four-year financial costs are included at this stage as the CRM is an underpinning technology for Digital Delivery; a means of collating and managing digital demand beyond email is required for any transformation activity. Given that a lot of investment would be made in making the system work, it is not something that the Council would ideally consider on a short-term basis. Four years is the maximum contract length currently allowed under G-Cloud 13.
- 4.6 It should be noted that as more users are added to the system, costs will increase – this is not accounted for in the figure above. The initial Jadu Connect offer will include 20 licences for customer service staff. These licences provide full access to the system and allow for the complete management of transactions. The increase in costs from adding more licences for further staff would be incurred on any Software as a Service platform.
- 4.7 Not all staff however would require a full customer service license. Free license types are included within the proposal, to allow non-customer service staff access requests which relate to their service and to provide updates if these are not achieved through automation. This includes third party contractors who work on our behalf.
- 4.8 There are also further costs associated with resourcing the project appropriately, specialist advice, training and potential integrations with other suppliers that require additional software or consultancy. As such, it is recommended that an allocation of £20,000 (accounted for above) is also made from the existing Customer and Digital Services seed funding budget, to cover any such requirements during the first year. Further funding may be requested as the CRM expands into other areas.
- 4.9 Any significant spend from this allocation would be discussed with the Portfolio Holder for Transformation on a regular basis. General project spend would also be carefully monitored throughout.

4.10 The costs associated with staff resources required for the wider Change Programme are not specifically outlined as part of this proposal but will be included in the forthcoming Change Programme paper.

4.11 It should be noted that the CRM as a system in isolation will not generate any savings for the Council. As a new system, it is an expense that we currently do not have. This is discussed further in section 5.

5 Business Strategy

5.1 *Delivering Valued, Sustainable Services*

5.1.1 Introducing a CRM could potentially have several benefits for communities, but these will depend on the specific cases which are developed. Generically, benefits may include:

- Improved self-service enablement
- Better reporting and transparency
- Easier identification of problem hot-spots
- Greater access to data for ward councillors
- Improved council accountability
- Cost savings.

5.1.2 The CRM system itself will not generate a financial saving as it is a new system that incurs new costs; in isolation it is simply a new expense. However, it will directly facilitate back-office services realising efficiencies or generating additional income that will far exceed the systems costs. There are two principal ways that this may happen:

- Posts that are no longer required; or
- Software that can be replaced.

5.1.3 The CRM could trigger a redistribution of how staff skills are used to facilitate customer outcomes. This would help to reduce instances where specialist staff are used to triage queries (figure 5) and instead, focus their interactions on areas which benefit from their specific knowledge. The improvements made to service workflows through automation may also allow some posts to be released and staff redeployed to other areas.

5.1.4 The case management capabilities of the CRM could also be used to replace some back-office software. For example, Jadu's service library contains numerous examples of workflows and CRM forms which have been built by authorities to replace functionality currently in our regulatory services software, Civica APP. This is slated for replacement by 2025/26 and currently costs £41,000 per year. It is fully anticipated that a replacement system will cost at least double this.

5.1.5 Whilst using the CRM to replace a full line of business application would be a complex undertaking, we have the skills to do this, and it would provide the opportunity to tailor how the solution works to meet our teams needs entirely – unlike many off the shelf systems which instead require the service to work around the software.

- 5.1.6 Utilising a CRM could open opportunities to introduce further assistive technology to services, such as intelligent telephony, improved analytics, spatial reporting within a geographic information system, more consistent and higher quality data, the potential for the use of artificial intelligence to perform basic processing and, the removal of menial tasks, such as re-keying data that's already been entered by the Customer.
- 5.1.7 Each service would also become far more accountable as an independent, unchangeable record of customer interactions would be created. This would open new possibilities for performance monitoring, allow earlier detection of issues and facilitate better resource planning based on quantifiable demand.
- 5.2 *Creating vibrant, safe and healthy communities of the future*
- 5.2.1 The benefits toward this strategic objective will again vary according to the specific use case. But in all instances the CRM will provide the Council with significantly more data about where, when and how frequently problems are occurring, so that more effective actions may be taken.
- 5.2.2 The CRM will also allow more dynamic allocation of resources to respond to issues more effectively and facilitate better prioritisation. This is particularly important where the delivery of services is in association with a safety aspect where a timely response could be critical.

6 Environmental/Climate Change Implications

- 6.1 There are several potential climate change and sustainability benefits to introducing a CRM, but these will vary depending on the specific type of case being processed. Generically, they may include:
- **Printing:** The CRM will be primarily driven by intelligent e-forms, which potentially could reduce the need for traditional printed forms. This has downstream implications for reducing paper consumption, transportation, postage, energy consumption and the production of waste toner.
 - **Travel Reduction:** Using the CRM effectively may allow the Council to optimise the services it delivers that require transportation. For example, requests to remove graffiti could be route optimised to minimise journeys around the district. This has an implication for CO₂ production directly associated with vehicles and plant equipment.
 - **Sustainability Reporting:** Where a CRM process has an environmental impact, it may be possible to report from the system to monitor sustainability impacts more accurately over time. For example, reports of fly-tipping may be monitored against specific interventions taken at a particular site, as well as the identification of hotspots.

7 Analysis of the effects on Equality

- 7.1 There is no specific equality impact of introducing the CRM system. However, each service that is built within the CRM will require an equality impact assessment as it will uniquely influence how customers interact with a service.

8 Data Protection

- 8.1 If accepted, the proposal has significant implications for data protection as the CRM will be processing personally identifiable information, which may include protected characteristics.
- 8.2 A Privacy Impact Assessment will be undertaken in conjunction with the Council's Data Protection Officer at a high level to cover the CRM as an entity. As new CRM based services are designed, Privacy Impact Assessments may be undertaken that address specific use-cases and data protection statements will be developed appropriately for each interaction type.

9 Health and Wellbeing

- 9.1 There are no specific Health and Wellbeing implications.

10 Risk Assessment

- 10.1 Introducing any new system or method of working will carry risk. The most significant risks associated with the implementation are detailed below.
- 10.2 *Cyber Security and Data Protection*
 - 10.2.1 In time, the CRM system will store vast amounts of personally identifiable customer data. If the CRM system is not sufficiently secured, there are risks to the confidentiality, availability and integrity of this data. Cyber Security and Data Protection incidents can result in significant financial and reputational damage for the organisation and may lead to legal and regulatory consequences.
 - 10.2.2 This risk will be mitigated by ensuring that a full assessment of the providers security arrangements is undertaken (using the principles of the National Cyber Security Centre's Cloud Assessment Framework), that a full data map is produced, developments are sufficiently documented, and that regular security testing and training is undertaken.
- 10.3 *Resistance to Change*
 - 10.3.1 Introducing the CRM will require changes to how people work and may require staff to learn new software and procedures. Resistance to this change may undermine the successful adoption of the CRM system, limiting the potential benefits and reinforcing past experience that it won't work. This will impact the systems effectiveness and reduce the delivered benefits.
 - 10.3.2 This risk will be mitigated by not only having project management in place, but also change management. The programme will be designed so that incremental changes are made, with visible outcomes that are positive for the customer and organisation. Unwavering support from both the Senior Leadership Team and Cabinet will also be required, with a cast-iron reinforcement that this is the best path for the Council to take.
- 10.4 *Ineffective Integration*
 - 10.4.1 To be successful, the CRM has to offer end-to-end automation of some processes. Integrating the CRM with existing line-of-business applications

will be complex and challenging. Incompatibility issues, data migration problems, and technical difficulties may arise during the implementation process that could result in operational disruptions, delays, increased costs, and dissatisfaction among users and customers.

- 10.4.2 To mitigate this risk, the team will develop a program that aims high, but starts small. Basic integrations and those which can be achieved through “off the shelf” components will be attempted first, so that our development team have an opportunity to hone their skills. Larger, more challenging integrations will not be tackled until later in the programme, and where necessary, specialist resource will be requested to complement our team.
- 10.5 Other risks for the programme will be fully explored and captured as part of the risk log.

11 Consultation

- 11.1 The principles of introducing a CRM have been previously discussed by SLT in December 2022 and again in February 2023.
- 11.2 The idea was also discussed at multiple Transformation Project Advisory Board meetings in 2022 and 2023. The potential for the introduction and benefits of pursuing CRM technology was also discussed (briefly) at the [April 2023 Overview and Scrutiny meeting](#).
- 11.3 Discussions have also been held with the Portfolio Holder for Transformation and the Portfolio Holder for Finance in relation to a CRM’s role in the Change Programme.

12 Background papers:

Developing a Digital Strategy for South Warwickshire, Cabinet, December 2021 – [Available Online](#)

One Stop Shop Business Case, Executive, March 2018 – [Available Online](#)

Digital Transformation of Services, Executive, December 2015 – [Available Online](#)

Review of WDC/WCC Customer Service Centre & Digital Transformation Initiatives, Executive, September 2015 – [Available Online](#)

Customer Relationship Management System Contract Award – Executive, March 2008 – [Available Online](#)

Work Programme Update, Overview and Scrutiny, April 2023 – [Available Online](#) / [YouTube](#)

13 Supporting documents:

When it comes to building trust, start with your Citizen Experience, December 2022 - [Available Online](#)

How Councils are using CRM to support residents with the cost of living emergency, December 2022 – [Available Online](#)

Digital Transformation in Waste Services – [Available Online](#)

Broxbourne Borough Council Digital Service Uptake – [Available Online](#)

Swindon Borough Council – From 8% to 64% - [Available Online](#)

Merton Borough Council – Fly Tipping Strategy (P11) - [Available Online](#)

Jadu Connect – [Available Online](#)

Jadu Connect Library – [Available Online](#)