

Record of officer decision

Decision title:	To develop, deliver and commission the Microsoft Dynamics CRM replacement system currently used by the customer services team and associated forms on the Herefordshire Council website
Date of decision:	14 January 2022
Decision maker:	Director of Resources and Assurance
Authority for delegated decision:	<p>Herefordshire Council's Constitution (19 May 2017) Scheme of Delegation, Part 3: Section 7 – Officer Functions: 3.7.5 Operational decisions</p> <ul style="list-style-type: none"> • Is within an approved budget • Is not in conflict with the council's policies, strategies or relevant service plans <p>Within the Chief Executive Scheme of Delegation the Assistant Director Corporate Support is authorised under the section Corporate Centre – 67 Facilities Management to make this decision.</p>
Ward:	Countywide
Consultation:	<ul style="list-style-type: none"> • Management board meeting held on 5 October 2021. • Adults and Communities Core DLT • Internal workshops with stakeholders • Councillor Harvey, Cabinet Member – finance, corporate services and planning •
Decision made:	To develop, deliver and commission the Microsoft Dynamics CRM replacement system currently used by the customer services team and associated forms on the Herefordshire Council website.
Reasons for decision:	<p>The current Microsoft Dynamics CRM 2011 system was purchased and developed in 2011, which provides a basic system for recording customer contact and logging requests for service. Components of the current system used by the customer services team and supports forms on the website are no longer supported by the existing supplier which provides the associated risks:</p> <p>It is no longer possible to develop the current solution to meet our changed needs as the original supplier is no longer available to carry out this work on our behalf. Although the data is regularly back up it provides a risk</p> <p>It has not been possible to capture data required to support the Council's response to Covid-19 such as volunteer contact details, key support requirements for members of the public and food ordering and delivery information.</p> <p>This project will review the current functions and services required for the future within the customer services team and provide a system that will:</p> <p>Give the customer a consistent and improved quality experience regardless of the channel</p> <p>Allow in-house development which will easily respond to changing demands</p> <p>Enable a combined view of the customer and activity across the council's departments and services – a 'golden' record</p> <p>Provide monitoring and management of the contacts received from start to completion</p> <p>Enable the analysis of trends and demand so that the council can be proactive in offering services and be more timely in their delivery</p>

	<p>Provide a portal for councillors to raise and track requests on behalf of their constituents as well as access information.</p> <p>To complement this work a customer service strategy will be developed to consider the future customer services offer for Herefordshire Council which will also scope the future integrations required across all directorates to improve the customer experience.</p> <p>This proposal and recommendation will improve the system for the customer and staff and at this stage will replace the existing functions, further development and scoping is required for integration across other service areas.</p>
Highlight any associated risks/finance/legal/equality considerations:	The £444k cost of this project will be covered by £250k funding from the IT Transition budget with the remaining £190k coming from the Covid recovery grant.
Details of any alternative options considered and rejected:	In developing the business case for this project other options including retaining the existing system and seeking support from other suppliers for the current system. Both have been discounted as they would not provide a long term solution to the issues with the system.
Details of any declarations of interest made:	None

Signed

Andrew Lovegrove
Director of Resources and Assurance

Date: 14 January 2022