

**Report for:** Cabinet Member Signing

**Title:** To award a contract for the supply and support of a Customer Relationship Platform

**Report authorised by:** Jess Crowe, Director of Culture, strategy and Engagement

**Lead Officer:** Andy Briggs (Assistant Director Resident Experience) and Nathan Pierce (Assistant Director Digital and Change)

**Ward(s) affected:** All wards

**Report for Key/  
Non-Key Decision:** Key Decision

## **1. Describe the issue under consideration**

- 1.1. This report seeks Cabinet Member signing on the 21st of September 2023 approval to award a contract for the Granicus Digital Customer Relationship Platform (CRM), providing CRM and online MyAccount continuity and improved services as part of Corporate Delivery Plan, Think Haringey First and the Resident Experience Programme.
- 1.2. This contract will be for a period of 2 years with options to extend for up to 1 further year at a total cost for the 3 years not exceeding £931,497.
- 1.3 For the agreed draw down options the Director Culture, Strategy and Engagement or Director accountable for the line of services at that time will have the delegated authority to authorise contractual draw down options without lead member sign off.

## **2. Cabinet Member Introduction**

- 2.1 This Customer Relationship Platform (CRM) enables easier access to service, enables improved first-time resolution, promotes self-service, frees up the capacity to have better conversations with those that most need our help, and provides better insight to our residents through improved data and resident history which enhances resident experience.
- 2.2 Haringey Customer Services receives over 350,000 phone calls and 60,000 in person visits per annum. To now we have been a very transactional focused service due to the absence of a CRM and ability to understand the history of contact with our residents. As we move forward, we want to move away from being a transactional service to a more relational focused service supporting our residents with multifaceted enquiries; the CRM will enable this to happen.

## **3. Recommendations**

- 3.1 That Cabinet Member **approves**, the award of a contract for the supply and support of Granicus Customer Platform software for a period of 2 years from 1<sup>st</sup> November 2023 to 31<sup>st</sup> October 2025 at the value of £519,498 with the option to extend by a further 1 year to 31<sup>st</sup> October 2026 at the value of £411,999. The total contract value including draw down options is £931,497 over the 3-year period.
- 3.2 The contractually committed cost for the baseline product in year 1 is £171,499 and for year 2 and 3 it is £133,999 per annum making a total baseline product cost of £439,497
- 3.3 In addition to the baseline product cost the contract will allow for draw down options. The value of these options is £214,000 for year 2, and £278,000 for year 3 giving a total over 3 years of £492,000. This is required now so spend is approved when the draw down options are required, and their individual business cases and budget have been approved. The options are available but not mandatory or authorised at point of contract award.
- 3.4 For the agreed draw down options the Director Culture, Strategy and Engagement or Director accountable for the line of services at that time will have the delegated authority to authorise contractual draw down options without lead member sign off.

#### **4. Reasons for decision**

- 4.1 The current contract for Granicus expires in November 2023. We have already expedited our 2 years plus 2 x 1-year extensions under GCloud 11. The new contract would be under GCloud 13 for 2 years plus 1.
- 4.2 The new contract will enable business continuity of the newly implemented resident digital provisions plus provide the means to significantly enhance the digital service offer to residents, businesses, agencies and services making it easier to access, transact and receive updates on Council services.
- 4.3 Agreeing this new contract under the GCloud13 for 2 years plus 1 will allow the council to do market engagement, peer review with other councils and define the long-term strategic aspirations for a modern council in terms of how it manages customer data and develops its online service offer.
- 4.4 Procurement of the solution allows the Council to maintain the improvement to resident journeys developed as part of Phase 1 of the project, including:
- Housing
  - Council Tax and Benefits
  - Environment & Resident Experience
  - Parking
  - Financial Support/Connected Communities
- 4.5 Continued development of the Customer Service Hub (CRM) will improve resident self-service and digital transactions, increase channel shift and improve assisted services for residents who are not digitally enabled

- 4.6 Residents will see benefits from an improved service offering.
- Better utilisation of automation, auto population and smart forms so that residents do not have to repeat information already submitted (shorter call times).
  - Increase in customer satisfaction markers.
  - Reduction in complaints.
  - Haringey branding will remain consistent between the forms and CRM.
  - Smooth and easier digital journeys will encourage residents to adopt other digital journeys within Haringey.
  - More engaged residents in the digital journey that works for them.
  - Reduction in demand failure
  - Increased first time resolution.
  - Improved single interactions for multiple queries.
  - Improved resident journey histories
  - Improved case management and history for complex resident service requests.
  - Reduction in member escalations.
- 4.7 There will be an increase in online transactions and self-serve.
- Assisted channel shift.
  - Integrated payment process
  - Increased adoption of customers using digital channels.
  - Increased adoption of self service across Council service provisions.
- 4.9 Employee Engagement will improve.
- Creating better resident journeys and visibilities will create more trust with our residents which will reduce conflict on calls with our staff.
  - Staff will feel they have more purpose by being able to help residents better, improved communication and resolutions. By reducing fewer complex enquiries staff will be able to provide more support on complex cases for resident's wellbeing
  - Staff will be more confident to deal with queries
  - Staff will be more confident to deal with escalations
  - Improved staff retention.
  - Staff will care more which will improve the quality of service to our residents

## **5. Alternative options considered**

### **5.1 Do Nothing**

- If the Council does not re-procure the customer platform, we will see severe disruption to resident experience due to the removal of the newly implemented CRM in the contact centre and housing and the withdrawal of the new resident online digital offering.

- The inability to digitally transact centrally,
- The inability to have conversations with Customer Service using case history (e.g., every time they call, they will have to start from the beginning as no case history is available)
- The end of single sign-on functionality resulting in a fractured digital experience with the Council

This will result in residents having a poor experience and interactions with the Council due to increased voice traffic, increased complaints and increased failure demand impacting on the resident journeys.

By removal of online digital centralised platform and CRM capability in customer service the resident future adoption of digital would be impacted whilst regressing the resident promise to increase trust in Haringey.

## **5.2 Go to open market to procure another CRM.**

If the Council were to stop and procure another product in November 2023, we would regress 1 ½ to 2 years whilst we re-initiate a new programme, impacting on residents' wellbeing, present online adoption and digital capability.

If we need run two simultaneously, we will have to pay for 2 contracts at the same time for a year and ½ for the period above. (250k plus new contract value).

Significant investment has been made on the Granicus platform and development which could not be recuperated if we moved to another platform at this time. This would impact future digital adoption by creating a fractured journey, which could delay benefit realisation in the future.

At present we have a team of experienced Granicus developers and delivery, there is a risk dependent on acquiring a new product requiring additional or more expensive resources based on skill set and delivery requirements.

## **6. Background information**

- 6.1 The contract for the current Granicus Digital Platform will expire November 2023 and, as a result, Haringey Council needs to put in place arrangements to ensure continuity of service.
- 6.2 The project team completed a due diligence exercise for requirements for the new CRM.
- 6.3 Based on the above review it was determined that GCloud13 was the most appropriate route to market. Using the GCloud 13 search and filter process Granicus were returned as the single result.
- 6.4 The future modelling of the product will give the council the option to procure to buy a like for like service with additional 50 licences (year one only) with a cost of £439,497. This would at a minimum level allow the continued development of the product across other services in CRM and online transactions.

6.5 Within the contract there is also the ability to expand the enablement and offering for residents for improved functionality and resident journeys. This contractual draw down options are of a value of £492,000. This would allow and enable the strategic digital aspirations for Granicus for Haringey residents.

- Social Media Authentication
- 200 additional licences
- 100 Licences shared services portal for external partners
- Members Portal
- Business Portal
- Shared Services Portal
- 25 Offline Licences for mobile working
- Support packages for development team
- System polling functionality for systems that can't use Api's
- Additional single sign on

6.6 The Council currently uses Granicus System to manage its online My accounts and CRM. As part of the Digital Customer Service Programme the platform this year will be enhanced to provide improved digital functionality for housing, financial support, parking, libraries and E&N. Residents will have improved digital journeys, accounts for rents, housing, council tax and benefits, improved access to online services and improved end to end resident journeys within Haringey. This will enable residents to manage payments, view transactions, and report transactions and request service support.

The platform provides Customer Service, a CRM for Residents and staff to transact with a full contact history of transactions. The CRM will also provide workflow for identified resident journeys into services providing a full end to end Residents Experience.

By collecting data in a systematic way, we will be able to automate service delivery and create an improved resident experience.

A new contract post November 2023 will focus on optimising the solution to provide a single-entry point through My Account on the new website and a single view of customer interactions via the CRM. The project will, additionally, improve current high traffic and workflow by utilising smart workflows and automations.

The emphasis will be on improving the resolution of enquiries/transactions which is essential to a good resident experience across the Council.

A procured platform will enable us to optimise new functionality which will support, the enablement of any future resident access strategy and position the council well for any future strategic resident engagement decisions.

Any ongoing platform enhancements will enable improvements across council services and external agency relationships whilst capitalising on benefits. These efficiencies are expected to release resources which can then be re-invested back into further service improvement or captured as financial savings. However,

it is key to note that any financial savings are not in scope as the platform's key function is to deliver a great resident experience.

The aim of procuring Granicus on the G-Cloud framework is to provide the capability and enablement of any agreed strategy that supports the manifesto and corporate delivery plan. This decision report does not define the strategy but has been developed to ensure enablement of the strategy through providing a baseline product and additional options that can be added to meet future council strategic options around access to services.

- 6.7 The Granicus Customer Platform procurement under Crown Commercial Service's (CCS) G-Cloud 13 Framework will provide Residents, Businesses, Landlords and other groups' access to a range of Council services. It will deepen and broaden the digital services available, managing and tracking customer enquiries, service requests and 'one and done' transactions.

This will support the strategic vision of Think Haringey First and commitments we have made to our residents in the manifesto and corporate delivery plan, under the resident experience programme.

- 6.8 The Platform will deliver significant financial and non-financial benefits to the Council and customer groups including:

- Savings in Corporate & Customer Services and other Council services
- Improving the digital offer for customers, making more Council services accessible online, providing customers better access to services and updates at their convenience
- Providing a simple, intuitive and personalised system to use which becomes the desired channel for accessing Council services. Improving the overall experience of using digital services
- Managing and tracking customer enquiries, service requests and end to end transactions, regardless of if the customer is transacting through a customer account
- Generating easy to understand management information to support service development.
- Improving resident online journeys and streamlining processes to provide a better and more efficient end to end resident journey.
- Reducing repeated demand failure by better integrated journeys for residents with service. Improving first time resolution and voice traffic into contact centre and services.

## **7. Procurement Process**

- 7.1 The programme identified the G-cloud 13 framework as the most expedient method for procuring a new Customer Platform. G-Cloud and provides access to a wide range of suppliers.
- 7.2 One supplier was identified on G-Cloud 13 using a keyword search based on a requirements specification produced by the project team.

7.3 The single supplier offer was evaluated, and it was concluded that the Granicus offer met the council's requirement specification which formed the basis of the search criteria used.

## **8. Contribution to strategic outcomes**

The procurement of a new Customer Platform contributes to the Corporate Delivery Plan, Values and Think Haringey First.

Resident experience will be improved.

- Building trust in the community - Using positive online interactions to build positive relationships through a resident –centric approach
- Easy Community Access – Getting our customer service offer right so it can open a range of new community access points
- Public Service Ethos – Creating a workforce culture of customer service excellence across all touch points and supporting, equipping and training employees to undertake their roles well
- Place Leadership – Demonstrate great customer service that helps to build positive relationships with residents, communities, businesses and partners with accountability that is defined and understood
- Commitment to Inclusion – Create consistency in service standards across all channels and access points

## **9. Statutory Officers comments (Chief Finance Officer (including procurement), Head of Legal and Governance, Digital Services, Equalities**

### **9.1 Finance Comments**

9.1.1 The maximum cost of this three-year contract award being an initial two years plus the option to extend by one further year is £931,497. This is split between the core solution costing £439,497 and the optional functionality and services costing £492,000.

9.1.2 The total core solution (£439,497) costs are made up of the like-for-like service in the existing GCloud 11 contract and the addition of 50 licences (in year one).

9.1.3 The cost of the core product and associated year one licence costs is £386,497 which will be funded from existing provision within the Capital Programme (Scheme 605: Customer Services: Digital Transformation). Licence costs of £26,500 per annum in years 2 and 3 will be funded from existing provision in the Digital Services contracts budget.

9.1.4 Currently there is no identified funding for the additional functionality options. However, a separate funding bid is being worked up for submission into the MTFS planning process. Until this source of funding has been confirmed the Council cannot proceed to draw down on these options.

### **9.2 Strategic Procurement Comments**

9.2.1 The report recommends awarding a contract for the provision of a Customer Relationship Platform (CRM) by selecting a contractor from the GCloud 13

framework. The GCloud 13 framework is a suitable framework under the terms of CSO 7.01 b) having been established by a public sector body.

9.2.2 The contractor was selected in accordance with the rules of the GCloud 13 framework by undertaking a search of contractor offerings available on the framework by use of keywords and phrases taken from the council's requirements. The offering resulting from the keyword search was then evaluated to ensure that it met the needs of the council.

9.2.3 The process undertaken is compliant with the selection rules of the GCloud 13 framework.

9.2.4 The Cabinet member is permitted under CSO 9.07.1d) to award a contract valued at more than £500,000.

9.2.5 Strategic Procurement support the recommendations in section 3 of this report.

### **9.3 Legal Comments**

9.3.1 This report is proposing the award of a contract from the Crown Commercial Service' G-Cloud 13 framework agreement.

9.3.2 Pursuant to Contract Standing Order (CSO) 7.01(b) and Regulation 33 of the Public Contract Regulations 2015 the Council may award contracts called off under a framework established by another public sector body.

9.3.3 Strategic Procurement have advised that the call off process complies with the call off rules of the G-Cloud 13 Framework

9.3.4 Pursuant to CSO 9.07.1(d) contracts valued at £500,000 or more must normally be awarded by Cabinet.

9.3.5 The Head of Legal and Governance (Monitoring Officer) is not aware of any legal reasons preventing Cabinet approving the recommendations in this report.

### **9.4 Equality Comments**

The Council has a public sector equality duty under the Equalities Act (2010) to have due regard to:

- Eliminate discrimination, harassment and victimisation and any other conduct prohibited under the Act
- Advance equality of opportunity between people who share those protected characteristics and people who do not
- Foster good relations between people who share those characteristics and people who do not.

The three parts of the duty applies to the following protected characteristics: age, disability, gender reassignment, pregnancy/maternity, race, religion/faith, sex and sexual orientation. Marriage and civil partnership status applies to the first part of the duty.



Although it is not enforced in legislation as a protected characteristic, Haringey Council treats socioeconomic status as a local protected characteristic.

Ensuring the platform is fully accessible to support all customers was an important part of the procurement process. Requirements included ensuring the Platform:

- Is compliant (to WCAG 2.1 AA standards) so that users with visual impairments and other accessibility issues can navigate and interact
- Includes features that enable users for whom English is a second language to navigate and interact with it in order to complete desired transactions

Overall implementation of a new Customer Platform will enhance the digital services available making it easier for all services users to contact and transact with the Council.

However, as some customers will be unable to or have more difficulty accessing digital channels or would prefer to use traditional channels such as telephone and face to face, the Council will continue to ensure that customers are fully able to access Council services while encouraging and supporting customers to use the new digital offering.

#### **10. Additional comments**

Digital Services Comments

Digital Services has been a core part of the project team throughout this process and can confirm their support of this decision. G-Cloud ensures a level of pre-evaluated standards such that suppliers' credibility is sound.

#### **11. Use of Appendices**

N/a

#### **12. Local Government (Access to Information) Act 1985**