

TO:	CHAIR AND MEMBERS CORPORATE SERVICES COMMITTEE MEETING ON AUGUST 26, 2014
FROM:	LYNNE LIVINGSTONE MANAGING DIRECTOR, NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES
SUBJECT:	RFP14-20 CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE IMPLEMENTATION PARTNER

RECOMMENDATION

That on the recommendation of the Managing Director, Neighbourhood, Children and Fire Services, the following actions be taken with respect to the Customer Relationship Management Software Implementation Partner:

- (a) the proposal submitted by PricewaterhouseCoopers LLP for the provision of a Customer Relationship Management Software Implementation Partner in accordance RFP14-20, at a total estimated cost of \$399,476.25 HST extra, **BE ACCEPTED**;
- (b) the financing for this purchase **BE APPROVED** in accordance with the "Sources of Financing Report" attached hereto as Appendix "A" to this report;
- (c) the Civic Administration **BE AUTHORIZED** to undertake all the administrative acts that are necessary in connection with this purchase;
- (d) the approvals given herein **BE CONDITIONAL** upon the Corporation entering into a formal contract for this purchase; and,
- (e) the Mayor and City Clerk **BE AUTHORIZED** to execute any contract, statement of work or other documents, if required, to give effect to these recommendations.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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- Report to Strategic Priorities and Policy Committee, October 29, 2012
- Report to Strategic Priorities and Policy Committee, December 4, 2012
- Report to Strategic Priorities and Policy Committee, December 16, 2013
- Report to Strategic Priorities and Policy Committee, April 14, 2014

BACKGROUND

Purpose

The City sought proposals from qualified implementation partners to assist in the implementation of the first phase of its Customer Relationship Management (CRM) system, Microsoft Dynamics. The scope of the request for proposal included resources to provide project management, technical and functional consulting as well as training and other requirements.

Purchasing Process

A formal Request for Proposal (RFP) was issued in June 2014 and four (4) submissions were received. These proposals were evaluated by a team with representation from Development and Compliance Services, Environmental and Engineering Services, Finance and Corporate Services, Legal and Corporate Services, Neighbourhood, Children and Fire Services, Parks and Recreation Services, Western University and Purchasing and Supply. The evaluation followed a three stage process, as follows:

- Stage 1: Requirements, Technical and Proponent Service Evaluation
- Stage 2: Presentation and Interview Evaluation
- Stage 3: Financial Proposal Evaluation

The highest overall scoring proponent (Stages 1, 2 and 3), PricewaterhouseCoopers (PwC), is recommended for award. PwC represented the best value and understanding for this project. In addition, the Phase One budget is less than the estimate projected for this portion of the work.

Discussion

A Customer Relationship Management (CRM) system is a critical component of Service London. CRM software is at the centre of our drive to modernize and integrate our customer service channels (online, in-person, and telephone) and is a key enabler in providing customer experiences that are simple, seamless, personalized and accountable. Specifically, CRM software allows for enhanced workflow management by creating, assigning and tracking all interactions with our customers and houses a robust database that will be accessed by all call-takers, allowing for real-time access to the most up-to-date and relevant information about the services we provide. It will also be used to manage service requests from start to finish through integration with work order and other back-of-house systems, which supports business process improvements and the tracking of performance indicators.

The City is applying a phased approach to the implementation of Microsoft Dynamics CRM. The vendor will be involved in all areas of Phase One, from start to post go-live support. This includes:

- Project management;
- Technical and functional consulting (platform setup, information and service requests, knowledge base, GIS/ESRI integration, testing, pilot deployment, pilot support);
- Training; and,
- Other considerations, including assisting in developing a roadmap to extend the solution to accommodate future phases.

It is estimated that Phase One of this project will conclude in the first quarter of 2015. In order to meet this tight schedule, the Service Areas involved in Phase One (Development and Compliance Services, Environmental & Engineering Services, Finance and Corporate Services, Legal and Corporate Services, Parks and Recreation Services) have already begun a number of pre-project tasks related to IT infrastructure, knowledge base article/script development and process mapping. This upfront work is key to meeting the overall project timelines of implementation in the first half of 2015.

The City will work diligently to mitigate the risks associated with a project of this nature through contract management, statement of work management, milestone-based scheduling, approvals and payments and project management best practices.

Acknowledgements

The RFP Evaluation Team consisting of Sarah Corman, Catherine DeForest, Lori Kolodiazny, Scott Oldham, Jay Stanford and Chris Ginty CPPB assisted with the creation of this report.

PREPARED BY:	RECOMMENDED BY:
ROSANNA WILCOX, MANAGER, SERVICE LONDON	LYNNE LIVINGSTONE, MANAGING DIRECTOR, NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES

- c. Martin Hayward, Managing Director Corporate Services & Chief Financial Officer
Mike Turner, Deputy City Treasurer
Jay Stanford, Director, Environment, Fleet and Solid Waste
Mat Daley, Interim Director, Information Technology Services
Kate Graham, Manager Corporate Initiatives, City Manager's Office
John Freeman, Manager, Purchasing & Supply