

TO:	CHAIR AND MEMBERS CORPORATE SERVICES COMMITTEE MEETING ON NOVEMBER 3, 2015
FROM:	LYNNE LIVINGSTONE MANAGING DIRECTOR, NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES
SUBJECT:	CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE IMPLEMENTATION PARTNER - PHASE TWO

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 price of \$350,399 (HST extra) negotiated with PricewaterhouseCoopers LLP for the provision of a Customer Relationship Management Software Implementation Partner – Phase Two **BE ACCEPTED** on a Single Source basis in accordance with sections 14.4 (d) and 14.4 (e) of the Procurement of Goods and Services Policy;
- (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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- Reports to Strategic Priorities and Policy Committee, October 29, 2012, December 4, 2012, December 16, 2013, April 14, 2014
- Report to Corporate Services Committee, August 26, 2014

BACKGROUND

Purpose

The purpose of this report is to seek Council approval for a Single Source procurement with PricewaterhouseCoopers LLP (PwC) for the Customer Relationship Management (CRM) Software Implementation Partner – Phase Two.

Discussion

Council’s 2015-2019 Strategic Plan for the City of London identifies ‘Leading in Public Service’ as a strategic area of focus. This strategic area of focus includes the strategy ‘excellent service delivery’ under which the Service London Implementation Plan is referenced. The City of London provides nearly 100 services that Londoners rely on, and thousands of transactions to customers each year. The Service London Implementation Plan includes critical improvements to service delivery, and will significantly improve customers’ experiences with the City of London.

CRM software is a key component of Service London and the backbone of our drive to modernize and integrate all customer service channels (online, telephone, in person). CRM software standardizes the customer experience through automated workflow (create, assign and track service requests) and houses a robust information database that provides call-takers with consistent and current information about our services. This allows us to provide customer experiences that are simple, seamless, personalized and accountable.

In 2014, Microsoft Dynamics CRM was selected as the CRM software product for the City. Dynamics CRM is an industry standard, flexible software solution that provides a familiar user experience for staff, and leverages existing expertise and experience within Information Technology Services.

Phase One

In 2014, the City sought proposals from qualified implementation partners to assist in the implementation of the first phase of its CRM system. A formal Request for Proposal (RFP) was issued in June 2014 and four (4) submissions were received. Following an extensive evaluation process, PwC, the highest overall scoring proponent, was selected as the City's Implementation Partner for Phase One of the CRM project.

The scope of Phase One included developing and implementing core CRM functionality in four areas: Business Services Division (Public Service Call Centre – extension 4570), Dispatch, Solid Waste, and Roads and Transportation.

Phase One commenced on October 17, 2014 and the solution was launched internally on March 17, 2015. Highlights from this phase included:

- Workflow built for over 60 individual service requests in the Solid Waste and Roads and Transportation areas. Examples include: potholes, missed garbage/recycling collection, snow removal, street sweeping, sod damage, etc.;
- Integration built between CRM and City Maps, as well as CRM and SharePoint;
- Mobile technology to access and complete service requests piloted by Solid Waste and Road and Transportation teams;
- More consistent and efficient management of common service requests for Solid Waste, Roads and Transportation;
- A better user experience for call centre agents and Operations staff; and,
- Most importantly, a better customer experience as a result of standardized intake processes, the ability to track service requests, and increased ability to close more requests on the first point of contact with the City.

Phase One was highly successful. All milestones and deliverables were achieved and the project was delivered on-time and on-budget.

Phase Two

The scope of Phase Two will include extending the CRM solution to five new areas:

- Construction Administration;
- Parks Operations;
- Sewer Operations;
- Storm Water Management; and,
- Wastewater and Drainage Engineering.

This will include building standardized intake processes (service requests), automated workflow, associated knowledge base scripts, and associated mapping for each of the services noted above.

One of the key achievements from the first phase was building the core foundation for the CRM system. This has significant benefits for Phase Two, including: (a) the technical achievements such as service request functionality, associated application integrations, and custom coding will be leveraged and reused wherever possible; and, (b) by leveraging the work of Phase One, we are able to increase overall project workload while containing costs.

It is estimated that Phase Two will conclude May 30, 2016. In order to meet the tight schedule, the services noted above have already begun pre-project tasks related to information technology infrastructure, knowledge base article/script development, process documentation and other mapping requirements.

The City will continue to diligently 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.

The addition of these services to the CRM platform will allow for a more consistent and efficient management of common service requests for these areas and, ultimately, a more streamlined and seamless customer experience for citizens.

Rationale for Selecting PwC for Phase Two Implementation

Civic Administration is seeking a Single Source procurement in accordance with sections 14.4 (d) and (e) of the Procurement of Goods and Services Policy.

14.4 (d) There is a need for compatibility with goods and/or services previously acquired or the required goods and/or services will be additional to similar goods and/or services being supplied under an existing contract;

14.4 (e) The required goods and/or services are to be supplied by a particular supplier(s) having special knowledge, skills, expertise or experience.

This is based on the following rationale:

- Engaging PwC for Phase Two will allow the City to leverage the skills, expertise and experience gained during the first phase. The Phase Two engagement will bring back the same PwC project resources. This team has in-depth knowledge of business requirements, project deliverables and outcomes, as well as a collaborative and productive rapport with internal stakeholders;
- Engaging PwC in Phase Two will ensure compatibility with the core CRM functionality built in Phase One. This includes existing service request functionality and associated application interfaces, including custom coding;
- From both a business and technology perspective, building upon the success of Phase One will sustain project momentum and allow the City to continue to develop key internal core competencies. This supports our drive to reduce overall project costs and maximize the value of external resources.

Future Phases

The City will continue to apply a phased approach to the implementation of our CRM software solution. Civic Administration will report back on the success of Phase Two following its completion, and will make recommendations on how to proceed with subsequent phases.

Project Funding

The funding for this project is part of the original allocation for the Service London Implementation Plan and will come from the Efficiency, Effectiveness and Economy Reserve Fund as per the attached Source of Financing.

This report and recommendation has been supported by the Service London Core Team and Purchasing and Supply.

PREPARED BY:	
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RECOMMENDED BY:	REVIEWED AND CONCURRED BY:
LYNNE LIVINGSTONE, MANAGING DIRECTOR, NEIGHBOURHOOD, CHILDREN AND FIRE SERVICES	ANNA LISA BARBON DIRECTOR, FINANCIAL SERVICES

- c. Martin Hayward, Managing Director Corporate Services & Chief Financial Officer
John Freeman, Manager, Purchasing & Supply
Bill Coxhead, Managing Director Parks and Recreation
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