

## REQUEST FOR ASSISTANT DIRECTOR DECISION – ADD2663

### Title: Customer Relationship Management for Economic Development – renewal of subscription for a further year

#### Executive summary:

This ADD seeks approval to use programme budget to renew the licence subscription for a customer relationship management tool for the Economic Development team.

The team has had a subscription for Insightly licences for three years and has twice gone to market for quotes during that period. The IT reseller framework will be used to procure the renewal.

This decision approves spend of £25,000 to purchase licences and support a plan of the software as a service from Insightly.

#### Decision:

That the Assistant Director of Economic Development and Programmes approves expenditure of up to £25,000 for 20 licences and support costs of the preferred customer relationship management software.

#### AUTHORISING ASSISTANT DIRECTOR/HEAD OF UNIT

I have reviewed the request and am satisfied it is correct and consistent with the Mayor's plans and priorities.

It has my approval.

**Name:** Alex Conway

**Position:** Assistant Director, Economic Development and Programmes

**Signature:**



**Date:**

14/08/2023

## **PART I – NON-CONFIDENTIAL FACTS AND ADVICE**

### **Decision required – supporting report**

#### **1. Introduction and background**

- 1.1. The Economic Development team leads several engagements and programmes that aim to ensure London's businesses thrive and contribute to the city's economic and social wellbeing. Examples include:
  - business engagement activity by officers, the Mayor and the Deputy Mayor for Business
  - economic Fairness programmes such as the Good Work Standard.
- 1.2. This requires the team to manage large volumes of data about businesses and key contacts. Previously, ADD2422 and ADD2524 authorised purchase of licences for a Customer Relationship Management (CRM) tool for one and then two years, at a value of £25,000 annually. The second of these subscription terms is now coming to an end. It is therefore necessary to take a further decision to renew the subscription.
- 1.3. The benefits of a CRM tool are that duplication of efforts from officers is minimised; and the 'customer service' offer to businesses better meets the standards that businesses and Londoners would expect. It also enables the team to track performance of activities and specific key performance indicators.
- 1.4. The funding comes from the 2023-24 Economic Development budget.
- 1.5. The IT reseller framework will be used to procure the renewal.

#### **2. Objectives and expected outcomes**

- 2.1. The single integrated system will continue to provide the team with an effective and efficient way of managing the unit's business engagement, in comparison to previous tools (Excel spreadsheets and Access databases) by enabling the following:
  - consolidation of our data: better coordination and collaboration between sub-teams
  - quality assurance: monitoring and oversight of business engagement that takes place across teams
  - efficiency: more efficient ways of pulling together all correspondence and engagement relating to specific stakeholders; collating and managing mailing lists; and managing invite lists collaboratively and efficiently
  - insight: automated reports on business engagement and business support activities; and tracking outputs and outcomes over time.
- 2.2. The Economic Development team contracted a consultant to revise the team's needs and usage requirements in 2021.
- 2.3. We regularly communicate with the Technology Group, and have shared our experience of adopting a Customer Relationship Management tool across City Hall. A corporate project is being initiated to look at CRM options. Should a corporate system become available, the Economic Development team could give notice to our CRM supplier.

#### **3. Equality comments**

- 3.1. The GLA is subject to the Public Sector Equality Duty. Overall, no adverse impacts have been identified as a result of entering into a licence agreement for a CRM.
- 3.2. The Mayor wants London to be the best place in the world to live and work. He wants to tackle low pay, improve workplace conditions, and boost diversity across employers of all sizes and sectors.
- 3.3. A CRM database assists with collection of data that can be used to draw insights into the businesses the GLA engage with across London. It also aids the understanding of the impact of policies and programmes on groups with a protected characteristic under the 2010 Equality Act.
- 3.4. The Mayor's Good Work Standard and broader business engagement activities all seek to improve outcomes for Londoners. Londoners spend a great proportion of their time at their workplaces. We have a significant role to play in supporting the financial wellbeing and healthy lifestyles of Londoners and all protected groups among them. All engagements have a focus on supporting diversity and inclusion.
- 3.5. The Mayor's Good Work Standard sets the benchmark for high employment standards. It covers paternity leave, flexible working, financial wellbeing initiatives, the gender pay gap, employee representation at senior decision-making level, personal development and career progression, among other vital elements to employee wellbeing and engagement. Pillar four of the Mayor's Good Work Standard concerns equality, diversity and inclusion. A key part of this pillar is ensuring that employers have an equality, diversity and inclusion strategy in place.

#### **4. Other considerations**

- 4.1. The Economic Development team's business engagement activities are key to delivering the outcomes included in the Mayor's Economic Development Strategy, such as the key policies of strengthening partnerships and promoting economic fairness.
- 4.2. Risk assessments are in place for the Good Work Standard activities. This investment seeks to mitigate the risks that a lack of coordination of engagement means businesses disengage, and that policy benefits for Londoners are therefore not delivered; or that GLA activities are less efficient and effective.
- 4.3. The implementation of the CRM will comply with the GLA's obligations under the GDPR.
- 4.4. There are no conflicts of interest to declare for any of the officers involved in the drafting or clearance of this decision form.

#### **5. Financial comments**

- 5.1. Approval is requested for expenditure of up to £25,000 for licences and support costs of the preferred Customer relationship Management software.
- 5.2. This expenditure is budgeted for within the approved Economic Development Unit's budget for 2023-24 financial year within the Good Growth Directorate.

#### **6. Planned delivery approach and next steps**

Activity	Timeline
Procurement via the IT reseller framework of 20 licences	August 2023
New licence subscription starts	30 August 2023
Licence subscription ends	29 August 2024

**Appendices and supporting papers:**

None

### Public access to information

Information in this form (Part 1) is subject to the Freedom of Information Act 2000 (FoIA) and will be made available on the GLA website within one working day of approval.

If immediate publication risks compromising the implementation of the decision (for example, to complete a procurement process), it can be deferred until a specific date. Deferral periods should be kept to the shortest length strictly necessary. **Note:** This form (Part 1) will be published either within one working day after it has been approved or on the defer date.

### Part 1 – Deferral

**Is the publication of Part 1 of this approval to be deferred? NO**

### Part 2 – Sensitive information

Only the facts or advice that would be exempt from disclosure under the FoIA should be included in the separate Part 2 form, together with the legal rationale for non-publication.

**Is there a part 2 form – NO**

### ORIGINATING OFFICER DECLARATION:

Drafting officer to  
confirm the  
following (✓)

#### Drafting officer:

Rachel Williamson has drafted this report in accordance with GLA procedures and confirms the following:

✓

#### Corporate Investment Board

A summary of this decision was reviewed by the Corporate Investment Board on 14 August 2023.

✓

### ASSISTANT DIRECTOR FINANCIAL SERVICES:

I confirm that financial and legal implications have been appropriately considered in the preparation of this report.

**Signature:**

*Anna Castrol*

**Date:**

14/08/2023