

## REQUEST FOR ASSISTANT DIRECTOR DECISION – ADD2524

**Title: Customer Relationship Management for Economic Development – procurement exercise to select a provider and decision to purchase licences and implementation support**

### Executive Summary:

This ADD seeks approval to use the programme budget to go out to the market again to procure a customer relationship management (CRM) solution in the Economic Development team. The CRM system will be procured on a two-year basis.

This follows a successful one-year pilot, and the commencement of a Request for Quote process including requesting quotes from five potential providers.

This Decision approves spend of £50,000 to cover licences and implementation costs of the CRM system from a preferred provider.

### Decision:

That the Assistant Director of Economic Development and European Programmes approves expenditure of up to £50,000 on a two-year contract to cover licences and support costs of the preferred CRM system.

### 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 European Programmes

**Signature:**



**Date:**

6 July 2021

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

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

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

- 1.1 The Economic Development team lead a number of initiatives and programmes that aim to ensure London's businesses thrive and contribute to the city's economic and social wellbeing. Examples include:
- Economic Fairness programmes (such as the Good Work Standard, increasing the number of London Living Wage employers in London)
  - business engagement activity by officers, the Mayor, the Deputy Mayor for Business and London Economic Action Partnership members
  - SME business support programmes (such as the London Business Hub, Technology Adoption Service, the Resilience Fund, Pay it Forward London).
- 1.2 In support of the programmes above, the team manages large volumes of data. Previously ADD2422 authorised the purchase of 40 licences for a CRM from a provider for a value of £25,000; this contract is now coming to an end. It is therefore necessary to go out to the market again with a list of requirements updated for our current needs.
- 1.3 The benefits of a single database system are that: duplication of efforts from officers is minimised; and the 'customer service' offer to businesses better meets the standards that business and Londoners would expect. It also enables the team to optimally track performance of activities and specific key performance indicators.
- 1.4 The funding comes from the Economic Development budget, as agreed in the corporate budget for 2021-22 and the provisional budget for 2022-23.

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

- 2.1 The single integrated system will continue to provide the team with an effective and efficient means of managing the team's business engagement, in comparison to the previous tools (Excel spreadsheets and Access databases), by enabling the following:
- consolidation of data: better coordination and collaboration between sub-teams within Economic Development and our delivery partners, including London & Partners
  - quality assurance: monitoring and oversight of business engagement that takes place across teams and with third-party delivery partners (in the case of the London Business Hub)
  - efficiency: more efficient ways of pulling together all correspondence and engagement relating to specific partners; collating and managing mailing lists; and managing invite lists collaboratively and efficiently
  - insight: automated reports on business engagement and business support activities; integration with datasets; 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 prior to re-engaging the market. This work informed the Request for Quote, and wider engagement with and adoption of the existing tool, in preparation for the new solution.

- 2.3 We regularly communicate with the Corporate IT team and have provided lessons learnt from our experience of adopting a CRM. Through our relationship with the GLA's pro bono consultants Bloomberg Associates, we have brokered some free support for the corporate team to consider corporate needs for CRM. Should a corporate system become available, the Economic Development team could give notice to our CRM supplier.

### **3 Equality comments**

- 3.1 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.
- 3.2 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.
- 3.3 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.
- 3.4 The GLA is subject to the Public Sector Equality Duty. The tender process was delivered to ensure compliance from all bidders with the duty if they were successful. Overall, no adverse impacts have been identified as a result of entering into a contract for implementation of a CRM system.
- 3.5 A CRM database assists with collection of data that can be utilised to draw insights into the businesses the GLA engage with across London. It also aids the understanding of the impact of policies and programmes with under-represented groups.

### **4 Other considerations**

- 4.1 Risk assessments are in place for the Good Work Standard and the London Business Hub 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.
- 4.2 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.
- 4.3 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 Following the expiration of the 40 CRM licenses purchased under ADD2422, the Economic Development team now seek to replace with a license spanning over 2 years. Assistant director approval is being sought for the revenue expenditure of £50,000 as profiled in the table below. The funding will be sourced from available funds within the CRM system, Economic Development budget contained in Good Growth. Budget allocation will be subject to the Authority's budget setting procedure in 22-23 financial year.

| <b>CRM License purchase</b> | <b>2021-22<br/>ED Budget</b> | <b>22-23<br/>ED Budget</b> | <b>Total</b> |
|-----------------------------|------------------------------|----------------------------|--------------|
| 1-Year license costs        | £25,000                      | £25,000                    | £50,000      |

\*The payment for the license will be made upfront for each of the two years.

## 6 Planned delivery approach and next steps

| <b>Activity</b>  | <b>Timeline</b> |
|--|-----------------|
| Procurement process begins (for externally delivered projects) | June 2021       |
| Contract start date and implementation                         | July 2021       |
| Contract end date  | July 2023       |

### 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 either be published 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**

Until what date: (a date is required if deferring): n/a

**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:**

Charlotte Rayner has drafted this report in accordance with GLA procedures and confirms the following:

✓

**Corporate Investment Board**

This decision was agreed by the Corporate Investment Board on 5 July 2021.

**ASSISTANT DIRECTOR OF FINANCIAL SERVICES:**

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

**Signature****Date**

6 July 2021

pp. Paul Middlemas on behalf of Anna Casbolt