

GREATER LONDON AUTHORITY

REQUEST FOR ASSISTANT DIRECTOR DECISION – ADD2422

Title: Customer Relationship Management for Economic Development- selection of a preferred provider and decision to purchase licenses and implementation support

Executive Summary:

This ADD seeks approval to use programme budget to procure a Customer Relationship Management (CRM) tool in the Economic Development team in advance of any corporate CRM solution being deployed. The CRM system will be procured on a one-year basis and the findings of the pilot will help inform the business needs of the wider GLA, allowing the Economic Development team to test and optimise our requirements, to inform any corporate system deployed in the future.

This follows acceptance of a business case by the Chief Officer in late October 2019, discussions with the Digital team, and the conclusion of a Request for Quote exercise which received three responses.

This Decision approves spend of £25,000 to cover licenses and implementation costs of the preferred CRM system to be provided by Insightly.

Decision:

That the Head of Economic Development approves:

Expenditure of up to £25,000 on a one-year contract with Insightly to cover licenses and implementation costs of the preferred Customer Relationship Management system.

AUTHORISING ASSISTANT DIRECTOR/HEAD OF UNIT

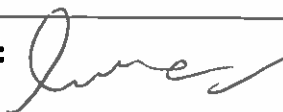
I have reviewed the request and am satisfied it is correct and consistent with the Mayor's plans and priorities.

It has my approval.

Name: Luke Bruce

Position: Interim Head of Economic Development

Signature:



Date:

05/21/20

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. Specific business-facing programmes include:
 - Economic Fairness programmes (i.e. rolling out the Good Work Standard and increasing the number of London Living Wage employers in London);
 - business engagement activity by officers, the Mayor, Deputy Mayor for Business and London Economic Action Partnership Members; and
 - SME business support programmes (i.e. London Growth Hub and Technology for Business scheme).
- 1.2. In support of the programmes above, the team manage large volumes of data currently held on a variety of Excel and Access databases and Outlook folders. There is no single system which connects, registers and coordinates activities between the teams or individual staff members. As such, it is difficult for the team to have a complete overview of interactions with businesses across these programmes.
- 1.3. This has, on occasion, resulted in duplication of efforts from officers and the 'customer service' offer to businesses not meeting the standards that business and Londoners would expect. It has also meant that we have not been able to optimally track the performance and impact of activities on the SME landscape beyond programme specific key performance indicators (KPIs). Nor can we ensure the outcomes from business engagements are maximised by building upon existing relationships and intelligence when promoting new policy initiatives.
- 1.4. A business case for the Economic Development team investing in a CRM ahead of any corporate solution was presented to the Chief Officer in October 2019 and approval was received to proceed to a Request for Quote stage. This exercise proposes Insightly as the preferred provider at a total cost of £25,000.
- 1.5. The funding is available following MD2296 'Economic Fairness programme' which approved expenditure of up to £0.55m for the Mayor's Economic Fairness Programme.

2. Objectives and expected outcomes

- 2.1. The rationale and expected benefits of a CRM system are as follows:
- 2.2. A single integrated system would provide the team with a more effective and efficient means of managing the team's business engagement 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 Growth 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; and
 - Insight: automated reports on business engagement and business support activities, integration with datasets and tracking outputs and outcomes over time.

- 2.3 At the request of the Mayor's Office, Bloomberg Associates have been supporting the development of a business case, on a pro-bona basis, by reviewing the business needs and will continue to support the tendering and deployment of a CRM solution. Bloomberg assert that, based on industry benchmarking, a CRM system and/or solution would improve the GLA's business support programmes' effectiveness by at least 10% in the first 6 months. The team would also be able to reach 25% more businesses with existing resources and this support could be targeted to those entrepreneurs/ businesses that need the support most. A CRM will enable the team to better collect outcome and impact measures, which could include:
- number of jobs created/number of new businesses started;
 - number of businesses reached/engaged on and offline by sector/size;
 - increase in usage of services/tools/information accessed and used by SMEs;
 - satisfaction rates based on services/tools/information offered;
 - number of employers signing up and accrediting to the Good Work Standard; and
 - more employers signed up to the London Living Wage.
- 2.4 The findings of the pilot will help inform the business needs of the wider GLA. These findings will be communicated to both the Digital Team and Technology Group, allowing insights to be utilised towards the deployment of any future corporate system deployment.

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. 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 amongst other vital elements to employee wellbeing and engagement.
- 3.2. Pillar four of the Mayor's Good Work Standard is about equality, diversity and inclusion. A key part of this pillar is ensuring that employers have an equality, diversity and inclusion strategy in place.
- 3.3. 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 have a significant role to support the financial wellbeing and healthy lifestyles of Londoners for all protected groups. All engagements have a focus on supporting diversity and inclusion.
- 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 services with Insightly for implementation of a CRM system
- 3.5. A CRM database will assist with collection of data that can be utilised to draw insights into the businesses the GLA engage with across London. It will also aid us in understanding the impact of policies and programmes, in particular with underrepresented groups.

4. Other considerations

- 4.1. Risk assessments are in place for the Good Work Standard and the Growth Hub activities. This investment seeks to mitigate the risk that a lack of coordination of engagement means that businesses disengage and the policy benefits for Londoners are not delivered or that GLA activities are not 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 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 being sought for the expenditure of up to £25,000 on a new Customer Relationship Management System.
- 5.2. A supplier has been identified to provide this system and quoted the cost of both implementation and licensing at £25,000. Payment will be an upfront cost to cover licenses and implementation with continual moderating for satisfactory delivery.
- 5.3. This system will be funded by the 2019/20 Economic Fairness budget held within the Good Growth Directorate.

6. Planned delivery approach and next steps

Activity	Timeline
Procurement of contract	5 February 2020
Minimum viable product in place	21 February 2020
License end date	20 February 2021

Appendices and supporting papers:

Appendix A: Business Case for CRM

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

If YES, for what reason:

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

Part 2 - Sensitive information

Only the facts or advice that would be exempt from disclosure under 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.

✓

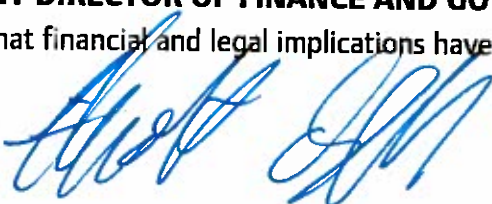
Corporate Investment Board

This decision was agreed by the Corporate Investment Board on 3 February 2020.

ASSISTANT DIRECTOR OF FINANCE AND GOVERNANCE:

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

Signature



Date

5/2/20

