

## APPENDIX B

### “Project Mandate”

Agenda item number:

Date of issue: **9 September 2016**

Meeting: Programme Board

Date: 19 September 16

Report by: Angela Roberts

Job title: Head of Communications

Service : Communications

Status: Awaiting Approval

Subject: CRM upgrade

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#### 1 Purpose of report

To seek approval from Programme Board and committee to include provision in the capital programme

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#### 2 Recommendations

To enable Transformational developments and to resolve operational issues that the £12,000 investment is approved to enable the software to run on windows 2008 and bring the test and live instances of the software up its most recently released version. To be funded from capital receipts.

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#### 3 Background

- The CRM software currently runs on Windows 2003 server environment with a Microsoft SQL 2005 database. The current version of CRM installed only supports Windows 2003 and Microsoft SQL 2005.
- Microsoft de-supported Windows 2003 and SQL 2005 from June 2015.
- The software, due to security vulnerabilities, has since Microsoft's de-support been moved to a more secure area of the network. This has caused performance issues for the operational use of the software within customer services.
- For the software to run on a Windows 2008 environment and SQL 2008 database it will require upgrading.
- This work historically has been undertaken by the in-house team. Resources have been allocated and attempts have been made by the in-house team to upgrade the CRM software in the test environment.

These attempts have failed fully or partially. With the conclusion reached that the work will need to pass to the supplier.

- The supplier will be tasked with bringing the test and live instances of the software up its most recently released version. The software:
  - 1) Can then be put onto supported versions of the windows environment and SQL database
  - 2) Can be moved back to its natural place within the network, improving performance.
  - 3) The test and live instances re-aligned allowing development activities to recommence.

The capital investment will enhance the asset as it can sit on a supported version of the Windows environment, namely Windows 2008. The current version is not compatible with this version of Windows, so this is an enhancement. Not having a stable and up-to-date CRM system is causing delays for the Transformation Programme.

- Northgate would create new Live and Test Front Office CRM environments on new supported Microsoft 2008 servers and migrate all processes and supported integrations on to the new environments.
- Whilst this option would resolve the issues detailed in the CRM position statement paper there are concerns that Northgate are not actively developing the product.
- Unfortunately, there is still no sign of a roadmap for Northgate Front Office despite numerous requests since March 2016. This does cause concern for the future of the system.
- However, not having a stable and up-to-date CRM system is causing delays for the Transformation Programme and as it stands it is not possible to make any changes to CRM processes unless done directly onto the live system.
- This is in addition to operational system performance issues. Customer Services are reporting that the system is running slowly.
- Therefore, to enable Transformational developments and to resolve operational issues in the quickest timeframe this is the recommended option.
- Northgate have quoted £12,000 to complete this work.
- Also to resolve the issue of identified Transformational developments not being able to be implemented on the Live CRM system it has been agreed that the Business Analyst will work overtime on a weekend for 14 hours to apply the new process to the Live system.
- As this is a live system and changes will be made to live processes it is critical that this work is completed outside of business hours, hence the requirement for overtime hours.
- Unless we wish to pay for the Northgate work to be completed outside of office hours, the Northgate Front Office system will be unavailable for 2 days when the Live system is created and the data is migrated across to the new environment and acceptance testing is carried out.
- Northgate's weekend usual rates are £2,000 per day.

- Northgate's timescales from point of order are 1-2 months for the Test environment to be upgraded and 2-3 months for Live. (short/medium/long)
- Once the system is on a stable supported platform we can use the system for as long as we need to.
- There are concerns around the future of Northgate's Front Office CRM. Northgate haven't explicitly said they don't see a future for their Front Office product, but as mentioned previously, attempts to get answers regarding its development have been fruitless.
- This necessitates research into alternative CRM solutions.
- This isn't a complex option due to the in-house skills at MBC to support the Northgate Front Office CRM system.
- Northgate consultancy is required to implement this option.

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5 Initial Assessment of risk

The risks associated with this option are as follows:

- Investing in a system that Northgate decide not to develop any further
- Investing in a system that Northgate decide to no longer support
- Not a long term solution, likely would require a replacement system within the next few years.

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6 Equalities and diversity and staffing implications

- No direct equalities' implications. Upgrade of current system.
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