Melton
Borough
Council

Business Case

CRM

Date: 7th Sept 2016

Melton Borough Council

Part A - Document Control

A 1 - Key personnel

Project	CRM migration to Windows 2008 environment
Sponsor	Angela Roberts
Project Manager	Stuart Oliver

A 2 - Version history

Version	Date	Summary of changes	Changes marked
0.1	7/9/16		

A 3 - Distribution

Name	Area
SO/CM/BK	Change Team
Mike Dungey	ICT Client
Angela Roberts	Comms Service
SarahJane O'Conner	Customer Services
Keith Aubrey	Strategic

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Part B – Project Background/Overview

B 1 – Background to the Project

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.

B 2 –Key Service Areas Affected

Customer Services

B 3 – Strategic fit

The CRM software is the main tool which supports staff delivering customer services through the phone and f2f channels.

Building a picture of customer relationships is essential when managing vulnerable customers with complex needs. The implications for CRM as a result of customer histories building up in alternative case management systems will require further assessment. But for now the main data source when managing demand is the CRM customer histories and interactions.

The workflow component of the CRM software supports the development of

automated processes. Allowing the consistency of delivery through the phone and f2f channels.

The main objective is to upgrade the software and install it on compliant versions of the Microsoft environment and SQL server.

Enhancements to the software will be part of the upgrades allowing functionality such as embedded webpages or file uploads to be added to workflows as identified through the process review workshops.

B 4 - Options appraisal

Please see appendix A options paper presented to programme board on the 22nd August.

In principle programme board endorsed the option to upgrade the software.

B5 -   Key Business Risks/Contingency plans

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

The risks are driven by the supplier's lack of a forward plan for their CRM product and fact they have two CRM products in the market.   So risk centres around the possibility that the CRM front office standard could become a legacy product.

To mitigate this a product roadmap has been requested from the supplier on numerous occasions without any positive response. This has been escalated to strategic director, KA.

A condition of the authorities order to upgrade would be an 'end of life support statement' from the supplier.

This solution it has been outlined is short-term and will allow some time to assess the longer term options while tackling the issues being experienced around:

- Performance of the system
- Development activities being on hold as TEST and LIVE are misaligned.

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B 6- Financial Implications

Cap / Rev
Please define if these are capital or revenue and the financial years they will be incurred. Also consider if they are Special or General Expenses or HRA

	£	£	£	£	Comment
Year	*2016/17*				
Initial Costs	*12,000*				*Capital*
External Funding					
Net Cost	*12,000*				
Ongoing Savings(-) /costs					

Detailed estimates should be provided to finance to assist with budget monitoring and reporting

B 7 – Project Scoring Matrix

Scoring – for your project – calculate the points				
Criteria	1 Point	2 Points	3 Points	Score
Cost £ (budget, time and human resource)	<£10k	£10k - £50K	>£50K	2
Timescale	< 6 months	6 – 12 months	> 12 months	1
Impact if project failed on the organisation	Minor disruption	Moderate	Major	2
Melton's Track Record	Done Successfully Many Times Before	Done Successfully Once or Twice Before	New Area of Working	3
Stakeholder Interest (internal and external)	Minimal	Moderate	Major	1
Project Complexity	Straight-forward	Moderately Complex	Highly Complex	1
Total score				10

Projects scoring 6 – 10 points - Formal methodology not necessary
Projects scoring > 10 points - Formal methodology is necessary

Note

The business case must be submitted initially to the Programme Board and will allow schemes to be prioritised and feasibility to be assessed. Programme board to agree the on-going project management required based on the above scoring and documented on the Project List