
EOI RECOMMENDATION REPORT

TO: CHIEF EXECUTIVE OFFICER
CC: MANAGER CUSTOMER & INFORMATION SERVICES
FROM: DIRECTOR CORPORATE STRATEGY & PERFORMANCE
FILE REF: 21/25137
DATE: 3rd June 2021

**Expression of Interest 2082 : Procure & Implement Enterprise
Customer Relationship Management System**

Issue

To consider the decline of all responses for Expression of Interest (EOI) 2082 for the supply, installation, technical maintenance and support for an Enterprise Customer Relationship Management System (ECRM).

Background

In 2013/14, the City undertook an Operating Model Review (OMR) with a focus on key IT systems. A significant output was an Enterprise Software Roadmap defining an IT replacement vision and a shift towards best in class IT deployment models. Following endorsement of the Enterprise Software Roadmap by the Executive Leadership Team, a Programme level business case was developed as part of Phase 2 of the OMR. The Enterprise Software Replacement Program was presented to Elected Members in early 2016, with the ECRMS being a key deliverable of the program.

The objective of the project is to procure and implement a “best of breed” Enterprise Customer Relationship Management System for the City. As per the conclusions of the Operating Model Review, increasing the City’s capability and maturity in the management of customer enquiries and interactions, knowledge of our civic composition and understanding of trends and priorities in customer relations, variety, robustness and flexibility in service delivery, and the development of alternative channels for customer interaction will be critical as the City seeks to meet the challenges of civic growth while achieving efficiencies and maintaining a high quality of service.

The existing Civica CRM system was assessed as providing an inadequate level of support for mature customer relationship management and does not generate the data required to support effective decision-making and strategic and operational planning.

Detail

The purpose of the EOI is to identify acceptable respondents who will provide the required functionality and benefits to progress to a restricted tender stage of the process.

EOI 20082 was advertised on Wednesday, 3 October 2020 and closed on Thursday, 10 December 2020. A total of six (6) addenda were issued. Responses received were from the following Vendors:

- Deloitte Consulting Pty Ltd (Salesforce)
- Destined 4 Pty Ltd (Salesforce)
- IT Visions Australia Pty Ltd (Salesforce)
- Open Office Holding Pty Ltd (Microsoft)
- Verint Systems Inc. (Proprietary Software)

The EOI Evaluation Panel (**Panel**) comprised:

- Project Manager Enterprise Software Renewal Program Customer & Information Services,
- Coordinator Customer Relations Centre,
- Business Systems, Online Communications Advisor,
- Manager Community Safety & Emergency Management,
- Manager Approval Services (Advisor),
- Coordinator Compliance,
- Senior Project Officer,
- Manager Waste Services,
- Contracts Officer (Facilitator),
- William Buck (Advisor),
- Chief Operating Officer (Advisor),
- ICT Technical Administrator - Information Technology (Advisor),
- Coordinator Rates & Accounts (Advisor),
- Senior Business Systems Analyst (Advisor).

Probity and Procurement Oversight

Oversight of the EOI assessment process was undertaken by an external Probity Advisor (William Buck Consulting (WA) Pty Ltd) and the City's Contracts Officer.

Submissions were evaluated in accordance with the EOI Procurement and Evaluation Plan¹ (**PEP**).

All respondents were deemed as conforming to Gateway 1: General Requirements, Conditions of Responding ²and therefore were eligible for assessment.

¹ CRM Procurement and Evaluation Plan 20/236217v5

Assessment Criteria

The Respondents were assessed against the information provided in response to the EOI.

Overall Assessment

The resulting EOI assessment by the Panel highlighted a gap in the City's available budget for a mature, best of breed ECRM.

Following a further review of possible options, a decision to decline all responses to the EOI and undertake further analysis as to the best option to meet the City's requirements is recommended.

Further detailed information to the respective responses and overall assessment is provided in the Confidential Attachment.

Relevant Stakeholder Consultation

Key stakeholders within the City were consulted on this Project.

Statutory Compliance

The Expression of Interest was invited in accordance with the requirements of Section 3.57 of the *Local Government Act 1995*. The EOI assessment complied with the requirements of Part 4 of the *Local Government (Functions and General) Regulations 1996*.

Strategic Implications

The proposal aligns with the following objective within the Strategic Community Plan 2017 - 2027:

Civic Leadership, Outcome 4.3 (Progressive Organisation)
Strategy 4.3.1 Lead excellence and innovation in Local Government

Corporate Business Plan 2021/21-2023/24

Key initiatives relating to SCP 4.3.1

- Information Communication and Technology Strategy & Roadmap (17/11205)
 - o 2020/21 – Implement
 - o 2021/22 – Implement
 - o 2022/23 – Strategy Review
 - o 2023/24 – Implement

Enterprise Risk Considerations

- CO-002 Technological Advancement, owner Director CS&P, rated Moderate
- CO-006 Data and Information Management, owner Director CS&P, rated Moderate
- CO-005 Corporate Systems

Financial and Performance Risk

Was not undertaken for the EOI.

Policy implications

Expressions of Interest invited were in accordance with the requirements of the City's Purchasing Policy.

Financial (Budget) Implications

Refer to Confidential Attachment for financial threshold analysis.

Recommendation

That the Chief Executive Officer, in accordance with Delegation 1.1.17 (2) of the Delegated Authority Register – Seeking Expressions of Interest for Goods and Services, DECLINES all responses to EOI 20082 Procure & Implement Enterprise Customer Relationship Management System.

