

# Decision Pathway – Report

**PURPOSE:** Key decision

**MEETING:** Cabinet

**DATE:** 07 November 2023

<b>TITLE</b>	<b>Re-procurement of Microsoft Dynamics Contract 2024-2029</b>		
<b>Ward(s)</b>	None		
<b>Author:</b> Rizwan Tariq	<b>Job title:</b> Head of Service – Citizen Services		
<b>Cabinet lead:</b> Cllr Craig Cheney, City Economy, Finance and Performance	<b>Executive Director lead:</b> Stephen Peacock, Chief Executive		
<b>Proposal origin:</b> BCC Staff			
<b>Decision maker:</b> Cabinet Member <b>Decision forum:</b> Cabinet			
<b>Purpose of Report:</b>  To seek approval to procure and award a contract up to 5 years for continued use of Microsoft Dynamics.			
<b>Evidence Base:</b>			
<ol style="list-style-type: none"> <li>1. Microsoft Dynamics is the Council’s Customer Relationship Management (CRM) system, implemented via the IT Transformation Programme.</li> <li>2. It is widely used within Citizen Services by agents and is a long-term strategic platform for all customer-centric activity, online access to services, single view of citizen interactions via the Data Lake, as well as delivering an opportunity to improve other functions such as field services in the future.</li> <li>3. Amongst others, Microsoft Dynamics offers the following benefits: <ul style="list-style-type: none"> <li>● <b>360-Degree view of citizens</b> The system is used to provide a unified platform to store and manage citizen information and interaction history across a range of channels including telephone, face to face and email. This enables advisors to have a complete view of citizens, their service requests and interactions, leading to a more personalised and efficient assistance.</li> <li>● <b>Efficient Case Management</b> Advisors can log, track, and manage citizen enquiries, service requests in a structured and organised manner. This leads to quicker problem resolution and better citizen outcomes.</li> <li>● <b>Automation and Workflow</b> The system can be utilised to automate routine tasks and workflows, reducing manual effort and minimising efforts. This includes the assignment of cases, follow-up reminders, and status updates.</li> <li>● <b>Data and Insights</b> The system provides robust reporting, which is used to measure performance metrics, and make data driven decisions to improve service quality and resource allocation.</li> </ul> </li> <li>4. The current contract expires in May 2024. A contract needs to be in place to continue utilising this vital solution.</li> <li>5. Procurement will be through a competitive procurement process using the appropriate route to market, likely to be within an established framework.</li> <li>6. Microsoft Dynamics are utilised well however there may be an opportunity in the future to reduce the licences required by staff, as contact is shifted to online channels and traditional contact volumes drop. The contract will therefore likely not commit the Council to spending the full contract value, and so the financial figure cited</li> </ol>			

within this report would be considered a ceiling amount.

- The cost of Microsoft Dynamics is contained within the council's existing budget spend for IT Operations and no budget growth is sought by this report.

**Cabinet Member / Officer Recommendations:**

**That Cabinet:**

- Approves the procurement and award of a contract for Microsoft Dynamics as outlined in this report.
- Authorise the Director – Policy, Strategy and Digital in consultation with the Deputy Mayor- Finance, Governance, Property and Culture, to take all steps required to procure and award the contract for Microsoft Dynamics for 5 years, in line with the procurement routes and maximum budget outlined in this report.
- Authorises the Head of Procurement & Contract Management to approve appropriate procurement routes to market where these not fully defined, or if changes to procurement routes are subsequently required.

**Corporate Strategy alignment:**

Adopting Microsoft Dynamics aligns with our corporate strategy by enabling the standardisation of processes, enhancing communication and optimising resources required to deliver services.

**City Benefits:**

Improved access to Council services via online channels, and better customer service across all channels.

**Consultation Details**

Not Applicable

**Background Documents:**

- Previous cabinet paper September 2021 - [ModernGov - bristol.gov.uk](https://www.moderngov.com/d/4280467/p/4280467)

<b>Revenue Cost</b>	<b>£1.658m</b>	<b>Source of Revenue Funding</b>	ICT service budget
<b>Capital Cost</b>	<b>£0</b>	<b>Source of Capital Funding</b>	N/A
<b>One off cost</b> <input type="checkbox"/>	<b>Ongoing cost</b> <input checked="" type="checkbox"/>	<b>Saving Proposal</b> <input type="checkbox"/>	<b>Income generation proposal</b> <input type="checkbox"/>

**Required information to be completed by Financial/Legal/ICT/ HR partners:**

**1. Finance Advice:**

This paper is seeking approval to Procure and award a 5 year contract for the continued use of Microsoft Dynamics with the current contract due to expire in May 2024. The requested /estimated contract value is £1.658m over 5-year (£0.332m per year). This is to be funded from existing general fund budget within IT Operations cost centre.

The previous 5-year contract due to expire was for £1.638m (£0.328m per year) with the new price quoted reflecting an increase of £20k (£4k per year) which is indicative of inflationary pressures since the last contract awarded almost 5 years ago.

Although there are no savings attached to this report, there are future opportunities to reduce the number of licences required by staff as contact is shifted to online channels and traditional contact volumes drop resulting in cost reduction hence not requiring the full contract value.

**Finance Business Partner:** Olubunmi Kupoluyi, Finance Business Partner Resources. 12 September 2023.

**2. Legal Advice:** The procurement process must be conducted in line with the 2015 Procurement Regulations and the Councils own procurement rules. Legal services will advise and assist officers with regard to the conduct of the procurement process and the resulting contractual arrangements.

**Legal Team Leader:** Husinara Jones, Team Manager/Solicitor. 17 October 2023

<b>3. Implications on IT:</b> IT are supportive of this proposal, but to allow for any future review in CRM technology, that suitable breakpoints are included.		
<b>IT Team Leader:</b> Alex Simpson – Lead Enterprise Architect. 25 September 2023		
<b>4. HR Advice:</b> No HR implications evident.		
<b>HR Partner:</b> Bryn Williams. 25 August 2023		
<b>EDM Sign-off</b>	Stephen Peacock, Chief Executive	30/08/2023
<b>Cabinet Member sign-off</b>	Cllr Craig Cheney, City Economy, Finance and Performance	25/09/2023
<b>For Key Decisions - Mayor's Office sign-off</b>	Mayor's Office	30/10/2023

<b>Appendix A – Further essential background / detail on the proposal</b>	<b>NO</b>
<b>Appendix B – Details of consultation carried out - internal and external</b>	<b>NO</b>
<b>Appendix C – Summary of any engagement with scrutiny</b>	<b>NO</b>
<b>Appendix D – Risk assessment</b>	<b>YES</b>
<b>Appendix E – Equalities screening / impact assessment of proposal</b>	<b>YES</b>
<b>Appendix F – Eco-impact screening/ impact assessment of proposal</b>	<b>YES</b>
<b>Appendix G – Financial Advice</b>	<b>NO</b>
<b>Appendix H – Legal Advice</b>	<b>NO</b>
<b>Appendix I – Exempt Information</b>	<b>No</b>
<b>Appendix J – HR advice</b>	<b>NO</b>
<b>Appendix K – ICT</b>	<b>NO</b>
<b>Appendix L – Procurement</b>	<b>NO</b>