



Officer Key Decision by Delegated Authority

Report to the Director of Performance Policy and Partnerships

For Action

Wards Affected: All

Award of a Contract for CRM Implementation

Appendix 1 is Not for Publication

1.0 Summary

1.1 This report requests authority to award a contract for an organisation to take on the CRM Developer role of Microsoft Dynamics 365 CRM. This report summarises the process undertaken in procuring the contract and recommends to whom the contract should be awarded.

2.0 Recommendations

2.1 That the Director of Performance Policy and Partnerships in consultation with the Deputy Leader award the contract for a CRM Developer in respect of Microsoft Dynamics 365 CRM to Infosys Limited for a period of 2 years.

3.0 Detail

Background

3.1 Brent Council's Digital Strategy made a case for a new corporate CRM to provide an enterprise platform which supports the business in accelerating both the breadth and scope of channel shift, to transform the customer experience and deliver efficiencies.

3.2 CRM has also been identified as a key component for the successful delivery of the Housing Operations Transformation programme.

3.3 Accordingly a project to purchase Microsoft Dynamics 365 licences, set up the capacity/resources for an in house team to deploy the solution corporately, and procure developers to deliver the Housing project by May 2018, was

costed and submitted to Cabinet for decision as part of the Digital Strategy recommendations.

- 3.4 The recommendation to fund the new corporate CRM was agreed by the Cabinet on 19 June 2017. The Cabinet also agreed, given the ambition to 'fast track' Housing Transformation, that the decision to award a contract for a CRM Developer of Microsoft Dynamics 365 and development of the in house team be delegated to the to the Director of Performance, Policy and Partnerships in consultation with the Deputy Leader.

Requirements

- 3.5 The requirements that were included in the procurement of this contract were:
- The provision of a Microsoft Dynamics 365 CRM solution for Housing;
 - Support to Brent Council to build its own internal Microsoft Dynamics 365 CRM Capability;
 - The supply of Microsoft Dynamics 365 CRM specialists to develop solutions for other departments of the council.

Outline of Tender Process

- 3.6 Tenders for the contract were invited from the Crown Commercial Service (CCS) Framework RM1043(iv) Digital Outcomes and Specialists (the "Framework Agreement"). Lot 1 (Digital Outcomes).
- 3.7 The opportunity was advertised on the CCS Digital Marketplace on 17th July 2017. The suppliers on the framework were then able to decide whether or not to apply to be included in a shortlist for tendering. The closing date for applications was 31st July 2017 and 8 suppliers applied. The tender evaluation panel then scored the suppliers' responses and shortlisted 4 to be invited to tender. The shortlisting was based on skills and experience only, in accordance with the framework rules.
- 3.8 The 4 shortlisted suppliers were invited to tender on 2nd August 2017, using the London Tenders Portal.
- 3.9 In accordance with the requirements of the Framework Agreement, the original marketplace advertisement and the Invitation to Tender stated that the selection of Suppliers to be awarded the contract would be made on the basis of the most economically advantageous bid and that in evaluating tenders, the Council would have regard to the following:
- Technical Competence: Essential Skills and Experience (3%)
 - Technical Competence: Nice to Have Skills and Experience (1%)
 - Technical Competence: Proposal (26%)

- Cultural Fit (10%)
- Price (60%)

Evaluation Process

- 3.10 The tender evaluation was carried out by a panel of officers from Digital Services and Housing.
- 3.0 All tenders had to be submitted electronically no later than 3pm on 8th September 2017. 3 tenders were submitted.
- 3.1 The suppliers were invited to attend interviews on 20th and 21st September, where they presented their proposals and the panel asked, and received answers to, some clarification questions.
- 3.2 Following the interviews, the panel met and agreed the scores for each element of the evaluation.
- 3.3 The names of the tenderers are contained in Appendix 1. The scores received by the tenderers for each lot are included in Appendix 2. It will be noted that Tender B was the highest scoring tenderer, and it is therefore recommended that the contract is awarded to Tenderer B, namely Infosys Limited.
- 3.4 It is anticipated that the contract will commence in October 2017. As the proposed contract represents a call-off under a framework agreement, a mandatory standstill period is not required.

4.0 Financial Implications

- 4.1 The Council's Contract Standing Orders state that contracts for supplies, services or works exceeding £500k shall be referred to the Cabinet for approval of the award of the contract. The value to Brent of this contract is above this threshold. However, the Cabinet has delegated authority to the Director of Performance, Policy and Partnerships, in consultation with the Deputy Leader, to award the contract upon completion of the procurement process.
- 4.2 The total value of the contract is estimated to be £751,000.
- 4.3 The investment required for the Digital Programme, of which this contract is a part, is to be funded by the capital programme.
- 4.4 The cost of the proposed early implementation of Microsoft Dynamics 365 CRM, prioritising Housing Operations, is covered within the overall housing transformation budget.

5.0 Legal Implications

- 5.1 The estimated value of the council's call off contract over its lifetime, as mentioned in paragraph 4.2 of this report, is above the EU threshold for services. Therefore the requirements of the Public Procurement Regulations 2015 ('PCR 2015') will apply in respect of the award of the call off contract. The call off contract is also deemed a High Value Contract as defined in the council's Contract Standing Orders and Financial Regulation, and as such Cabinet approval is ordinarily required to award the call off contract although on this occasion approval to award a contract for a CRM Developer has been delegated to the Director of Performance, Policy and Partnerships in consultation with the Deputy Leader.
- 5.2. The procedures and rules for establishment and use of framework agreements are contained in Regulation 33 of the PCR 2015. Contracts based on a framework agreement are required to be awarded in accordance with the procedures laid down in the PCR 2015. The council is able to call off under the framework without the need for advertising the contracts in the Official Journal of the European Union (OJEU), as it is only the framework agreement itself that has to be advertised in the OJEU.
- 5.3 The council's Contract Standing Orders also provide that where it is proposed by the council to call off under a framework established by another contracting authority, the council may do so with the relevant Chief Officer approval, provided that the Chief Legal Officer has advised that participation in the framework is legally permissible. The Crown Commercial Services Framework RM1043 (iv) has been reviewed by Legal Services and it has been confirmed that it is legally permissible to call off from the framework.

6.0 Equality Implications

- 6.1 The proposals in this report have been subject to screening and officers believe that there are no equality implications but this will be kept under review. There are likely to be considerations about accessibility of digital services for all customer groups.

7.0 Staffing/Accommodation Implications

- 7.1 None in addition to those contained in the report to Cabinet of June 2017.

8.0 Background Papers

None

8.1 **Appendices**

Appendix 1 – Not for publication

Appendix 2

Contact Officer(s)

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