



REPORT TO THE MEETING OF CABINET – 15 OCTOBER 2025

PORTFOLIO: RESOURCES – CLLR STEPHEN MOUNTFORD; SPECIAL PROJECTS & ASSETS – CLLR TOM GIBSON

REPORT FROM: ASSISTANT DIRECTOR - POLICY, PERFORMANCE AND CUSTOMER

SUBJECT: CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM UPDATE

1 PURPOSE OF REPORT

- 1.1 This report presents to Cabinet an update on the project to implement a new Customer Relationship Management (CRM) system and associated new website.

2 LINKS TO COUNCIL'S PRIORITIES AND OBJECTIVES

- 2.1 This relates directly to the Council's priority of Restoring the Council to good health (Customer satisfaction; Modern ways of working) and indirectly to the other priorities as the new CRM and website will support service delivery across all areas of the Council's business.

3 RECOMMENDATION

- 3.1 It is proposed that Cabinet **RESOLVES**

- (1) To note the progress with the CRM system implementation project.
- (2) To note the update to the cost / benefit profile that was presented in the business case to Cabinet in September 2024.

4 INTRODUCTION

- 4.1 The business case for investment in a new CRM system was approved by Cabinet in September 2024. This decision marked a key step towards modernising the way that residents and businesses interact with the Council in order to get information, request support and access services. In contrast with the way people access many services in other parts of their lives, including with public sector bodies such as DVLA, HM Passport Office and HMRC, most Council services can only be accessed during office hours, usually through a telephone call or a visit to the Council offices. There are some exceptions to this with e-forms relating to Council Tax, Benefits and Business Rates increasingly used by customers.
- 4.2 Following a competitive tender process held over the autumn of 2024, the contract was awarded in January 2025, with an indicative project start date of 1 April 2025.
- 4.3 This report is the first six-monthly progress update to Cabinet.

5 REPORT

- 5.1 Although intrinsically linked, the updates provided in this report are split between the website and the CRM system elements of the project. The following paragraphs cover these two aspects, as well as plans for communicating these changes and, finally, an update to the cost/benefit profile.

Website

- 5.2 During the discovery phase of the project, discussions were held between the internal project team and the contractor's project team about the look and feel of the website. Specifically, an early decision was made to base the new website on an out-of-the-box template rather than requiring the supplier to custom build the Council's new website based on the current website design. This decision has not only allowed for a much simpler website build phase of the project but has also allowed the Council to take advantage of a design template that has been developed with other councils the supplier is working with, especially with regard to accessibility.
- 5.3 **Appendix 1** to this report includes some screenshots of the current Council website alongside what the new website will look like. Although using a new and modern template, there is a deliberate continuity of design so that customers who currently use the website are able to recognise the high-level headings, which remain, in most cases, the same as those currently used.
- 5.4 In preparation for migration of content from the existing to the new website, a tool has been developed to automate much of this process. The internal project team has been reviewing and cleansing current website content and archiving hundreds of documents that are held in the current Content Management System (CMS - software that enables users to create, manage,

store and publish digital content to websites) so that only good quality and relevant content is brought across.

- 5.5 Cleansed data was exported to a test version of the new website in September with user Acceptance Testing (UAT) conducted from late September to early October.
- 5.6 Alongside data cleansing, 42 existing online forms have been identified as needing to be built in the new system – good progress has been made on this task, with some existing forms that just collect information from customers being rebuilt as more “intelligent” forms that are managed through the case management module of the new CRM.
- 5.7 At the time of writing this report, the current scheduled go live date in the project plan for the new website is November 2025.

CRM

- 5.8 A key part of the CRM aspect of the project has been to identify and map business processes for services provided by the Council. A Business Analyst was employed to lead on this task and has been in post since March 2025.
- 5.9 The project plan has identified 142 key processes which are being mapped “as is” (the process currently followed) and then “to be” (the desired new process, taking advantage of the capability of the new CRM to streamline work and improve ongoing communication with the customer). The mapping of 52 processes is in progress, 4 processes are complete and signed off, 10 processes have been identified as duplicates and one process is on hold. The longest “as is” process mapped so far is a Streetscene process which is 410 steps from start to finish.
- 5.10 As presented in the Business Case, the implementation of new processes will be on a phased basis, once they are ready for launch, rather than waiting for all processes to be built in the new system for a single go live. The bulky waste collection process has been developed, tested and implemented as an initial test case. This has allowed the project team to implement learning from the training they have received (with ongoing support from the supplier) and then to use this first process to build out other processes in the CRM. Initial focus will be on processes relating to, for example, missed bins and fly tipping as the analysis phase of the business case identified these as areas for which the Council receives high volumes of contact from customers and that require a large amount of manual intervention to respond to.
- 5.11 Another key workstream for the CRM relates to the development of connectors between the CRM and existing Council IT systems. An address connector has been configured to support address lookups from customers, alongside the use of Open Street Maps to support dropping of pins into maps to allow customers to indicate the precise location of the issue that they are contacting the Council about. Other connectors will allow the new CRM to link to: the Council’s payment system; the IT system used by Environmental

Health, Licensing, Land Charges and Planning; and the IT system used by the Revenues and Benefits department.

- 5.12 At the time of writing this report, new processes are scheduled to go live, in phases, shortly after the launch of the new website in November 2025. For the customer, accessing these new ways of reporting issues or requesting services should be intuitive and easy to use with the advantage over many of the current suite of e-forms being that they will drive workflow in the background, providing updates to the customer as their case is progressed towards resolution.
- 5.13 A phased launch of processes will continue over the remainder of the 2025/26 financial year and into 2026/27.

Communications

- 5.14 To ensure that the benefits of this significant digital transformation are realised, there is a need to communicate with residents and businesses in the Borough about the new website and how it will be possible to interact with the Council in new ways, at a time that is convenient to them, not just when the Council offices and telephone lines are open.
- 5.15 A “Digital by Default” campaign is being developed, forming part of the Council’s Fit for the Future transformation programme, to support this project. As well as communications to raise awareness about the new website, additional service specific communications will be used to encourage people to go online and interact with the Council in a new way that is simple to use. Alongside this, the communications will also make it clear that when customers need to speak to a member of the Council’s team they will continue to be able to do this.

Cost / Benefit Profile

- 5.16 The business case approved by Cabinet in September 2024 included a number of informed assumptions about expected costs of the new system, alongside expected benefits from efficiency savings through reduced phone calls, face-to-face visits and emails.
- 5.17 The cost assumptions have been updated with known costs of the system, removal or reduction of cost items that were listed as a separate cost but have been included in the bundled cost of implementation, as well as use of and reductions to the contingency for the project now that the Council has a fixed cost contract for implementation and ongoing support and maintenance.
- 5.18 Benefit assumptions have also been updated, reflecting when expected benefits will be realised, as well as some emerging vacancies within teams that have occurred naturally through retirement or changes to working patterns.

5.19 The impact of these changes presents a more positive position than that presented in the business case, with cumulative costs expected to be modest by the end of 2026/27 and savings delivered over 2027/28.

5.20 **Appendix 2** contains the updated detailed cost benefit analysis.

6 OPTIONS

6.1 Option 1: Do nothing. This option is not recommended as Cabinet agreed to substantial investment in a new CRM system in September 2024 and this report provides an update on implementation of the project.

6.2 Option 2: To note the recommendations in paragraph 3.1, as supported by the content of this report.

6.3 Preferred Option: Option 2 as this will ensure that Cabinet confirms that it has read and understood the progress made to date in delivering this significant digital transformation project for the Council.

7 RISK IMPLICATIONS

7.1 There is a risk that if this project does not deliver the benefits, as set out in the business case, that the new CRM project will represent an increased cost pressure to the Council. The project has a separate risk register which is reviewed and updated as part of project implementation which will help to mitigate the likelihood of this overall risk occurring.

8 LOCAL GOVERNMENT REORGANISATION IMPLICATIONS

8.1 The decision to invest in the new CRM was made before local government reorganisation (LGR) was announced. Further to implementation of LGR, there will be a need to integrate IT systems that are in use across the existing councils, including any CRM systems. However, the work on process redesign, website content cleansing and development of online forms and back office workflows will put the Council in a good position as much of this work would have to have been done in preparation for any IT system integration. The revised cost benefit analysis means that this project can be implemented and deliver savings for the Council in advance of the establishment of the new council through LGR.

9 CRIME AND DISORDER IMPLICATIONS

9.1 There are none.

10 ENVIRONMENTAL IMPLICATIONS

10.1 The new CRM will allow customers to report environmental concerns to the Council such as fly tipping, litter, broken Council assets using a simple to use online form.

11 FINANCIAL IMPLICATIONS

11.1 The detailed cost benefit analysis of the CRM system is set out in Appendix 2.

12 LEGAL IMPLICATIONS

12.1 There are none arising from this report.

13 HUMAN RESOURCES IMPLICATIONS

13.1 The business case for the new CRM, approved by Cabinet in September 2024, includes the potential for cashable savings through reduction in the number of people employed by the Council. This is planned to be on an organic attrition basis. Any human resource changes will be investigated and implemented with the Human Resources team to ensure full legal compliance.

14 EQUALITY AND DIVERSITY IMPLICATIONS

14.1 An Equality Impact Assessment (EIA) has not been completed as no decision is being made. A full EIA was carried out and included with the business case presented to Cabinet in September 2024.



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Background Papers:-

[Customer Relationship Management \(CRM\) System – Business Case – Cabinet 18 September 2024](#)

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Appendix 1 – CRM System Update Cabinet 15 October 2025




Castle Point BOROUGH COUNCIL

Enter keywords Search


Skip to content Site map




Supporting our residents




Apply for it




Pay for it



Report it



Check your bin date



Consultations

Benefits

- Universal credit
- Send us evidence
- Cost of living support

Council tax

- OPENPortal online account
- How to pay
- Discounts

For business

- Business rates
- Choose local business signups
- Business support and regeneration

Housing and homelessness

- Apply for council housing
- Housing repairs
- Your tenancy

Leisure and halls

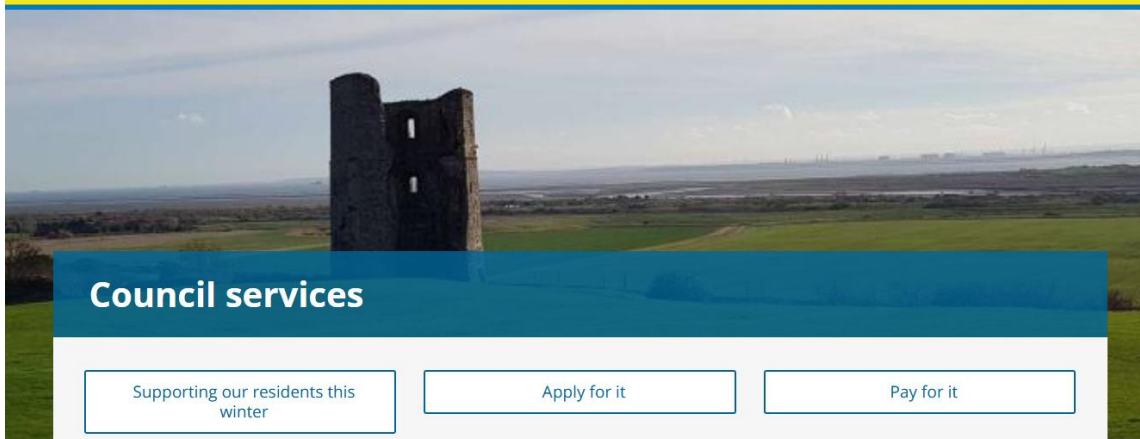
- View activities
- Book online
- Community halls

Planning and building control

- Planning applications
- Building control
- Castle Point Plan

Apply for it Report it Supporting our residents this winter Log in to my account

Castle Point BOROUGH COUNCIL Search...



Council services

Supporting our residents this winter

Apply for it

Pay for it

Report it

Check your bin date

Consultations

Benefits

- [Universal credit](#)
- [Send us evidence](#)
- [Cost of living support](#)

Council tax

- [OpenPortal online account](#)
- [How to pay](#)
- [Discounts](#)

For business

- [Business rates](#)
- [Choose local business signups](#)
- [Business support and registration](#)

Housing and homelessness

- [Apply for council housing](#)
- [Housing repairs](#)
- [Your tenancy](#)

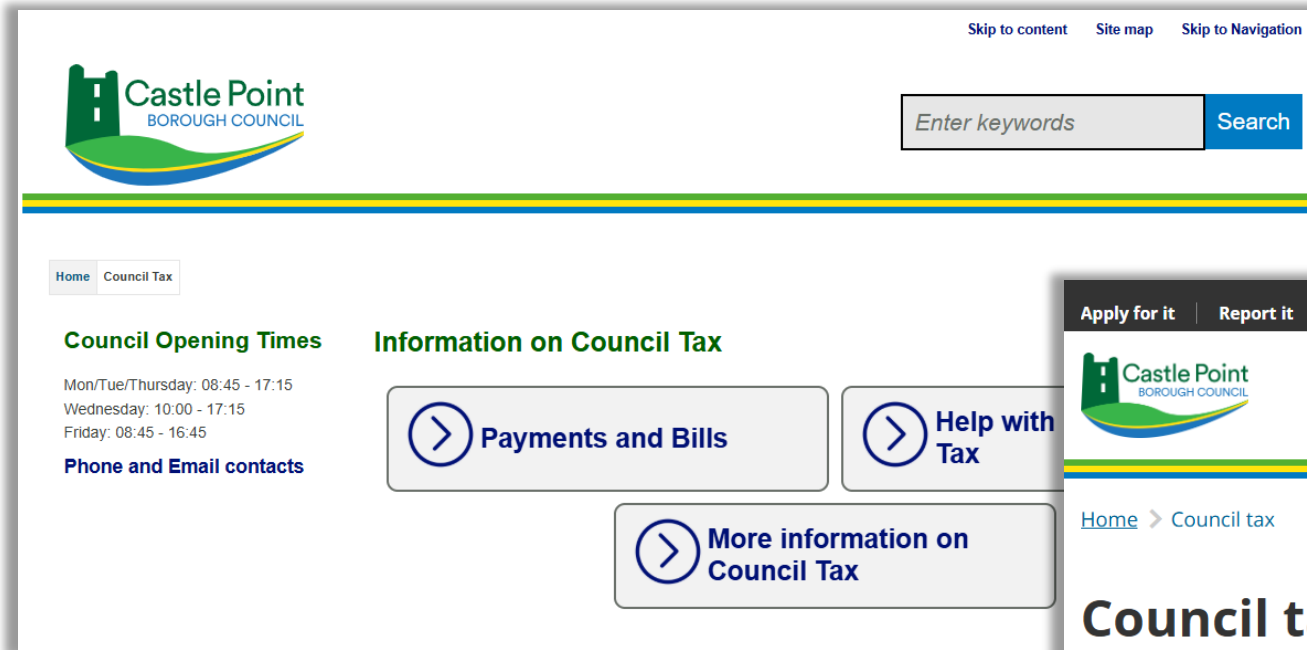
Leisure and halls

- [View activities](#)
- [Book online](#)
- [Community halls](#)

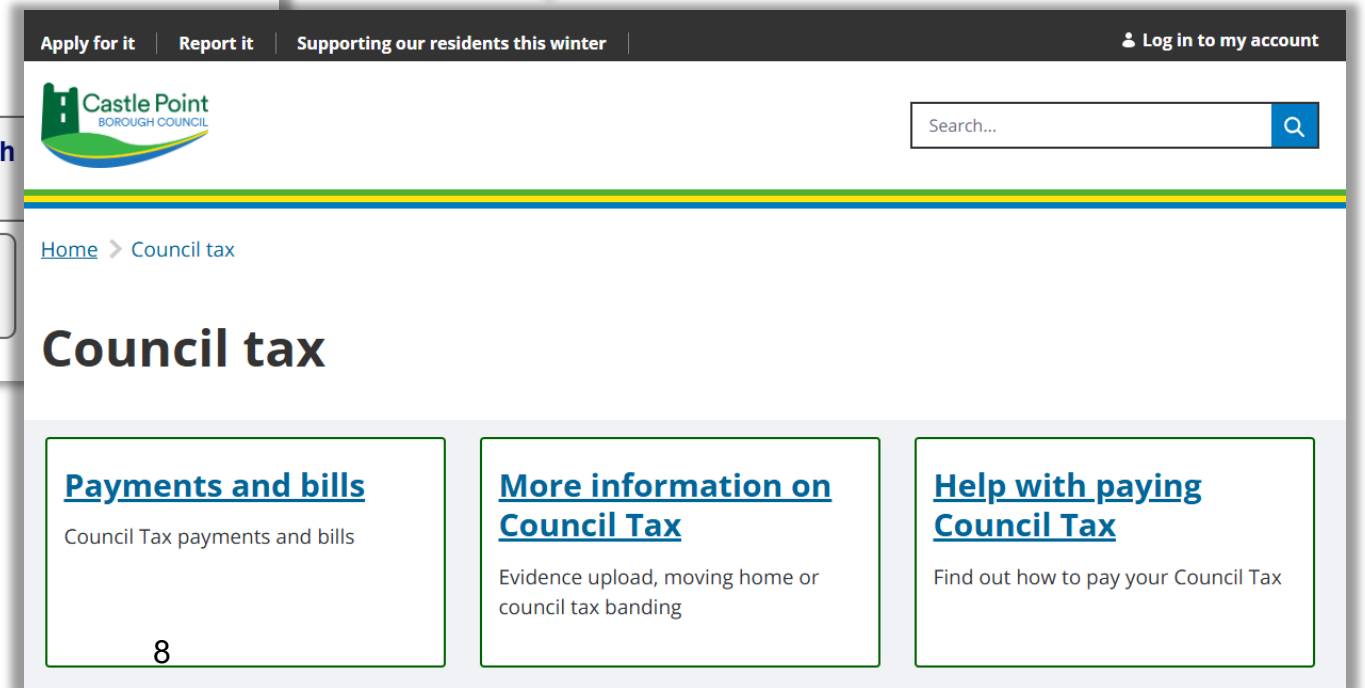
Planning and building control

- [Planning applications](#)
- [Building control](#)
- [Castle Point Plan](#)

Appendix 1 – CRM System Update Cabinet 15 October 2025



This screenshot shows the current website layout. At the top right, there are links for "Skip to content", "Site map", and "Skip to Navigation". Below these is a search bar with the placeholder text "Enter keywords" and a "Search" button. The main content area features a breadcrumb trail "Home > Council Tax". On the left, there is a section for "Council Opening Times" with details for Monday/Tuesday/Thursday, Wednesday, and Friday. To the right of this is a section titled "Information on Council Tax" containing three buttons: "Payments and Bills", "Help with Tax", and "More information on Council Tax".



This screenshot shows the proposed new website layout. The top navigation bar includes links for "Apply for it", "Report it", "Supporting our residents this winter", and "Log in to my account". The search bar is now a simple "Search..." field with a magnifying glass icon. The breadcrumb trail is "Home > Council tax". The main heading is "Council tax". Below this, there are three distinct content boxes, each with a green border:

- Payments and bills**: Council Tax payments and bills
- More information on Council Tax**: Evidence upload, moving home or council tax banding
- Help with paying Council Tax**: Find out how to pay your Council Tax

The number "8" is visible at the bottom of the first content box.

Appendix 2 – CRM System Update – Updated Cost / Benefit Profile

Cabinet 15 October 2025

Net cost/saving of new CRM	Notes				
	1	24/25	25/26	26/27	27/28
Capital costs					
System Specialist (third-party)	2				
Back Office Integration	3		62,500.00		
CRM full bundle	4		157,500.00		
Contingency	5		50,000.00		
Project Director	6				
Business Analyst	7		54,500.00	53,900.00	
Project Manager	8				
Support & Maintenance	9		92,000.00	92,000.00	
Implementation Comms	10		20,000.00		
Process Mapping Software	11		5,000.00	5,000.00	
Subtotal		0.00	441,500.00	150,900.00	0.00
Ongoing Costs					
Annual Support Cost	12				92,000.00
Existing Staff UAT, Training, etc	13		22,500.00	22,500.00	
Service Area Assistance	14		31,333.00	15,667.00	
Subtotal		0.00	53,833.00	38,167.00	92,000.00
Total costs		0.00	495,333.00	189,067.00	92,000.00

Appendix 2 – CRM System Update – Updated Cost / Benefit Profile

Cabinet 15 October 2025

Net cost/saving of new CRM	Notes	24/25	25/26	26/27	27/28
Cashable Savings					
2.45 FTE (existing vacancies)		(86,500.00)	(88,000.00)	(88,000.00)	(88,000.00)
Expected efficiencies through drop in calls, emails, walk-ins	15		(13,500.00)	(144,600.00)	(144,600.00)
Forecast efficiencies (organic attrition/reassignment/redundancy)	16		(25,500.00)	(125,900.00)	(125,900.00)
Existing e-forms Package Removal				(9,600.00)	(9,600.00)
Existing CRM Support removal				(16,000.00)	(16,000.00)
Print Savings			(750.00)	(3,000.00)	(3,000.00)
IT contractor Support removal				(2,000.00)	(2,000.00)
Total savings		(86,500.00)	(127,750.00)	(389,100.00)	(389,100.00)
Net cost/(saving)		(86,500.00)	367,583.00	(200,033.00)	(297,100.00)
Information: Cumulative cost/(saving)		(86,500.00)	281,083.00	81,050.00	(216,050.00)
Information: Non-cashable savings			(8,250.00)	(33,000.00)	(33,000.00)

Notes:

1. Reprofiled - no costs incurred in 2024/25 - these costs reprofiled to 2025/26.
2. Removed - £75,000 removed from this line as system specialist costs are included in the base price for implementation (CRM full bundle).
3. Unchanged - £62,500 in this line towards costs of integration, working with 3rd party suppliers.
4. Increased - actual costs increased from £125,000 to £157,500, covered by contingency (see note 5).
5. Reduced - £125,500 to £50,000: to cover £25,000 for increased cost of CRM full bundle and £7,500 for single sign on (added to CRM full bundle budget line); £20,000 for Implementation Comms (new budget line added); £5,000 for Process Mapping Software (new

Appendix 2 – CRM System Update – Updated Cost / Benefit Profile

Cabinet 15 October 2025

budget line added) and a further reduction of £12,750 as an overall £50,000 contingency considered sufficient at this stage of the project's implementation.

6. Project Director costs for 2025/26 (£3,867) and 2026/27 (£7,733) removed from this budget line being managed from within existing resources.
7. Increased and Reprofiled - from £54,000 across three years to £108,400 across two years to reflect actual costs and reprofiled to reflect implementation work in 2025/26 and 2026/27.
8. Project Manager costs for 2025/26 (£13,500) and 2026/27 (£27,000) removed from budget as sourced from within existing resources and supplier's Project Manager included in base price for implementation (CRM full bundle).
9. Reduced - first two year's Support & Maintenance cost estimate of £135,000 per annum reduced to £92,000 per annum actual cost.
10. New - budget line added to cover a Digital by Default comms campaign to raise awareness of new website and that more services can be accessed online.
11. New - budget line added to cover costs of specialist process mapping software in 2025/26 and 2026/27.
12. Increased - ongoing costs increased from £82,500 estimate to £92,000 actual
13. Reduced - from £45,000 to £22,500 in 26/27 as this equates to a total of 30 weeks of time which is a realistic amount of time for expected further training and testing in 2026/27.
14. Reprofiled - costs switched between 2025/26 and 2026/27 to reflect most of the work done with services in 2025/26.
15. Reduced - 2025/26 estimated savings will not be reflected until Q4 (reduced from £54,000 to £13,500).
16. Reduced - £31,475 to £25,500 although identified savings are deliverable as they relate to vacancies being held in Customer & Digital Services.