FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

IMPROVEMENT AND SCRUTINY COMMITTEE – RESOURCES

11 MAY 2023

Report of the Executive Director - Place

Integration between the Place highways asset management solution (Alloy) and the corporate customer relationship management solution (Granicus)

1. Purpose of the report

1.1   This report seeks to present a summary of the lessons learned report presented to the Portfolio Direction Group (PDG) on 4 April 2023 concerning the integration between the Place highways asset management solution (Alloy) and the corporate customer relationship management solution (Granicus).

2. Information and Analysis

2.1   The Confirm system has been the Highways ICT solution in its latest form since its last procurement in 2014. Its functionality has included the end to end management of all the Highways enquiries (or services) and some wider Place enquiries, the management of the highway assets and the works ordering/jobs processing system.

2.2   Following the approval of the Channel Shift (now Customer Experience) programme by Cabinet in March 2020 a Customer Relationship Management system was procured with the intention of giving the council a single view of the customer and enabling the delivery of complex and varied service to residents across Derbyshire. This provided Highways with an opportunity to procure a new asset management and works ordering system (Alloy) due to the corporate CRM system Granicus Firmstep being intended to undertake the

management function of all the Highways enquiries. As a key customer, Highways was consulted in helping to develop requirements and the benefits case whilst the Channel Shift team developed the specification for procurement and ultimately the Contract ready for implementation.

2.3   During the implementation of Phase 1 of the CRM with Highways a number of issues with the functionality of the Granicus Firmstep system were identified, including its ability to effectively replace the existing Confirm enquiry system and its capability to integrate with the current Confirm system and the new asset management system Alloy. These issues were presented to PDG on 12 September 2022 and a solution approved on 1 November 2022.

2.4   At the request of PDG a lesson learned review of the integration between Alloy and Granicus Firmstep was commissioned and undertaken by the Place Department IT Senior Relationship Manager. This was completed and presented to PDG on 4 April 2023.

2.5   The lessons learned review findings were that the challenges with integration between the systems were due to:

a) **Granicus Firmstep system capability**. The product has a lack of complex fault and case management functionality, required to deliver the volume and complexity of the Highways requirements for enquiry management. Therefore the efficiencies and improvements (benefits) in customer experience, improved reporting and business intelligence could not be realised as intended. The product offers fewer and less well-developed options for integration with other systems due to the products relative age in comparison to more recently developed solutions. Concerns were only raised by the Highway Service at implementation stage when training had been provided on the system. This is unlikely to be unique to Highways and may be experienced by other areas of service delivery, albeit the complexity of activity within Highways service delivery means that the issues are exacerbated.

b) **Complexity of the configuration of the Granicus solution**. Officers experience was that the configuration is more complex and less flexible than anticipated. The model adopted by Customer Experience of each service area to able to create, edit and maintain the system for their service area following training supplied through Customer Experience along with technical support from ICT services. However, in order to configure the system officers required a level of technical ability and service areas did not hold the resource expertise to implement (with the exception of Highways), and therefore had to rely and find additional funding to procure Granicus consultants to complete the work. This has led to a slower than planned implementation and multiple instances of templates for similar processes and configurations being overwritten for some areas of the business by mistake.

2.6   The lesson learned review concluded the following:

a) There was a failure to understand the system capabilities from both an ICT and business perspective during the procurement process and;

b) A distributed model for implementation for configuration has not been effectively managed, funded or resourced.

2.7   The lessons learned report highlighted a number of recommendations as follows:

a) Requirement of programme and project governance to meet both corporate and service specific requirements through clarity about solution design to meet business and service need.

b) Integration risks should be identified and managed as part of the ICT strategy.

c) Requirement for solutions design capacity to ensure that essential capabilities are correctly identified to be delivered and the complex service and business area requirements can be met.

d) Requirement for corporate management and change control over the implementation of the Granicus solution through a centralised resource.

3. **Alternative Options Considered**

N/A

4. **Implications**

4.1   As stated in the body of the report

5. **Consultation**

5.1   In the compilation of the lessons learned report highway project, ICT and Customer Experience leads have all been consulted along with Granicus Firmstep users. The procurement documentation for both Granicus Firmstep and Alloy have been examined.

6. **Background Papers** (set out here where documents are kept in respect of this report)

6.1   N/A

7. Appendices

7.1   N/A

8. Recommendation(s)

That the Committee:

    a) Notes the overview information, challenges and lessons learned that are provided in the body of the report

9. Reasons for Recommendation(s)

9.1   To support the committee in understanding the issues and lessons learned concerning the integration between the Place highways asset management solution (Alloy) and the corporate customer relationship management solution (Granicus).

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Implications

Financial

1.1

Legal

2.1

Human Resources

3.1

Information Technology

4.1

Equalities Impact

5.1

Corporate objectives and priorities for change

6.1

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)