

HAMPSHIRE COUNTY COUNCIL**Decision Report**

Decision Maker:	Executive Member – Economic Development and Rural Affairs
Date:	7 November 2012
Title:	Customer Relationship Management Software
Reference:	4358
Report From:	Director of Economy, Transport and Environment

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1. Executive Summary

1.1. The purpose of this paper is to seek approval to procure appropriate Customer Relationship Management (CRM) software to enable effective management of investment enquiries, contacts, property/sites database and events.

1.2. This paper seeks to

- set out the need for CRM software;
- considers the potential benefits of the purchase of the software;
- considers the staffing implications; and
- considers the finance for the project and the impact on the budget.

2. Background

2.1. Hampshire, along with all other parts of the UK, competes in an increasingly competitive global market for the attraction of quality inward investment, to create jobs, grow the local economy, benefit local supply chains and stimulate the property market.

2.2. Although Hampshire County Council works in partnership with the national inward investment organisation, UKTI (UK Trade and Investment), the County Council must proactively pursue inward investment opportunities in its own right, capitalising on its key sector strengths across advanced manufacturing (specifically aerospace, defence and marine related), business, finance and professional services, and IT and communications.

2.3. The County Council must become more effective at generating and converting business investment related enquiries, along with its partners including the two LEPs, the City Councils and District Councils.

- 2.4. All leading UK inward investment agencies, including MIDAS (Manchester), Locate in Kent, Creative Sheffield and Marketing Birmingham, utilise one of two CRM software systems, Evolutive (supplier: Alcium) and Tractivity (supplier: RE-Systems).
- 2.5. Both Evolutive and Tractivity have been developed over several years specifically for use by economic development teams focused on attracting inward investment, and have property/site databases capable of being integrated with the respective agency's website. Both forms of software have significant enquiry and contact management capabilities.

3. Proposed Solution

- 3.1. It is proposed that Hampshire County Council procures appropriate CRM software which has been developed specifically for use by teams attracting inward investment.
- 3.2. Evaluation of the two software products on the market (Tractivity and Evolutive) will need to be undertaken to determine which would be most appropriate for the County Council's use.

4. Potential Benefits

- 4.1. The potential benefits of having use of appropriate CRM software include the following:
 - a) More effective management and tracking of all business related enquiries received and processed by the Economic Development team;
 - b) More effective management of all key contact information, which can be used to invite individuals to events;
 - c) More effective management of information related to both potential inward investors and indigenous companies;
 - d) Integration of property/site database with the Invest in Hampshire website – available for on-line property searches; and
 - e) Future potential to integrate/network enquiry management across Hampshire, including both the city council and district council economic development teams.

5. Staffing Implications

- 5.1. If approval is given to procure such CRM software, staff training will be required to ensure effective and efficient use of the software.

6. Costs/Funding

- 6.1. Final costs for procuring CRM software as described above are not yet finalised, but a budget of up to £15,000 per annum is proposed. These estimated costs are based on a likely breakdown of £8,000 annual licence fee, £5,000 annual fee for access to linked property database, £2,000 contingency.
- 6.2. This would be funded through the core Economic Development budget.

7. Recommendation

- 7.1. That approval be given to procure appropriate Customer Relationship Management software to enable effective management of investment enquiries, contacts, property/sites database and events.

CORPORATE OR LEGAL INFORMATION:**Links to the Corporate Strategy**

Hampshire safer and more secure for all:	no
Corporate Improvement plan link number (if appropriate):	
Maximising well-being:	yes
Corporate Improvement plan link number (if appropriate):	
Enhancing our quality of place:	yes
Corporate Improvement plan link number (if appropriate):	

Section 100 D - Local Government Act 1972 - background documents

The following documents discuss facts or matters on which this report, or an important part of it, is based and have been relied upon to a material extent in the preparation of this report. (NB: the list excludes published works and any documents which disclose exempt or confidential information as defined in the Act.)

DocumentLocation

None

IMPACT ASSESSMENTS:

1. Equalities Impact Assessment:

- 1.1 The proposals in this report have been developed with due regard to the requirements of the Equality Act 2010, including the Public Sector Equality Duty and the Council's equality objectives. An assessment of the impacts in this service area can be found at <http://documents.hants.gov.uk/equality-impact-assessments/ete/3-2-business.doc>.

It is considered that the issues covered by this report will not have impacts requiring further specific actions by the Council above those already established in its existing policies and working procedures.

2. Impact on Crime and Disorder:

- 2.1. If successful, this proposal will enable attraction of more inward investment into Hampshire, creating more jobs locally and having a positive impact on employment levels and thereby potentially on crime / disorder levels.

3. Climate Change:

- a) How does what is being proposed impact on our carbon footprint / energy consumption?

No significant change is anticipated.

- b) How does what is being proposed consider the need to adapt to climate change, and be resilient to its longer term impacts?

It is considered that the issues covered by this report will not have impacts requiring further specific actions by the Council above those already established in its existing policies and working procedures.