

AGENDA ITEM: 12



FINANCE AUDIT AND RISK COMMITTEE MEETING ON	Tuesday 3 June 2025
PREPARED BY:	Debbie Buggs
PRESENTED BY:	Debbie Buggs
SUBJECT	CRM update
PURPOSE DECISION / DISCUSSION	For noting
LINK TO CORPORATE OBJECTIVE	Organisational Robustness
RISK IMPACT ASSESSMENT	This project mitigates the risk of insecure and out dated systems.

In December 2023, Council approved £230k including VAT for the CRM and associated project management

The budget for 2025 was approved by Council on 27 September. It contained £300k for the CRM system and £100k for the website. Approval to spend £165k of this was given in March 2025

Of this £395k approved, £392k has been spent or committed, to bring us to a go-live date in early July 2025.

The remaining £235,000 is available for phase 2 of the project, although it should be noted that invoicing for education invoices which was planned for phase 2 has needed to be brought into phase 1 to ensure a clean cut-over from the old systems OE and My.N to the new CRM.

Phase 2 is likely to include:

1. Integration with Brightspace
2. Specialist Portfolio – modularisation
3. Further ‘expert practice’ qualifications
4. Additional OneFile integration
5. Additional website based data/application forms/payments for IBMS services for synchronisation with MS Dynamics CRM
6. Additional services payments systems through new website

FARC is asked to note the update

PREVIOUS CONSIDERATION	Budget for 2025 Council December 2023
RESOURCE IMPLICATIONS	As set out in the paper.