

EAST SUSSEX FIRE AUTHORITY

Meeting Fire Authority
Date February 11 2021
Title of Report CRM Project – Additional Funding Requirement
By Mark Matthews, Assistant Chief Fire Officer
Lead Officer Peter Harris, PMO Project Manager

Background Papers 2018 CRM III 1.0 – CRM Business Case

Appendices Appendix 1 – HMICFRS Inspection Outcomes and impact of CRM Project
Appendix 2 – Cost Models
Appendix 3 – Business Benefits by Minimum Viable Product
Appendix 4 – CRM Strategic Requirements
Appendix 5 – Supporting Documents

Implications

CORPORATE RISK	✓	LEGAL	✓
ENVIRONMENTAL		POLICY	
FINANCIAL	✓	POLITICAL	
HEALTH & SAFETY		OTHER (please specify)	
HUMAN RESOURCES	✓	CORE BRIEF	
EQUALITY IMPACT ASSESSMENT			

PURPOSE OF REPORT The purpose of this report is to provide an update on the delivery of the CRM project, which aims to deliver business critical enhancements to our prevention, protection and response services, and to seek approval of an additional investment of £1.094m bringing the total project budget to £1.969m to fund its full delivery.

EXECUTIVE SUMMARY This report outlines the additional funding requirements for the CRM project to enable delivery of the business benefits impacting our legal requirements to enforce the Regulatory Reform (Fire Safety) Order and meet legal expectations under the Fire Service's Act in respect to prevention of fires and ensuring risk information is available to crews, which remains a critical firefighter safety provision. The critical enhancements will also ensure that the protection, prevention and SSRI related elements of the IRMP can be fully realised.

The HMICFRS inspections review has essentially further clarified the expectations of the National Framework for prevention, protection and response and resilience. The original Business Case for CRM was written three years ago in 2018. Additional functionality, unforeseen at the time of the original business case, is required in order to respond effectively to the Grenfell enquiry outcomes, HMICFRS observations and the recommendations for improvement specifically related to firefighter risk information (SSRI related), Safe and Well/Home Safety Visits and Business Safety inspections. The identified enhancements across the three areas, Minimum viable products (MVP's), will now require an enhanced investment if the required benefits are to be fully realised. This will ensure the Service is able to respond appropriately to areas identified as requiring improvement, continue to meet its statutory obligations, supply required intelligence to central government, implement key elements of the current IRMP and share risk critical information across teams and partners to support the effective safeguarding of staff and the public.

The original business case was based on an assumption that we largely understood the work that was needed to upgrade the system (step 1) and deliver the enhanced functionality that was critically required across the three core functional areas (step 2).

The upgrade from MS Dynamics 2011 to MS Dynamics 365 (step 1) the cost for development increased from the original budget of £0.3m to £0.4m.

In hindsight the functional requirements of step 2 were largely unknown and therefore could not have been costed accurately prior to defining the capabilities required. Therefore, as part of the project, the Service took the very important step of ensuring that the many processes for all three areas were mapped comprehensively through a rigorous business analysis exercise involving the development of a series of storyboards and system pathways. This required the engagement of a business analyst who conducted numerous workshops over 14 months where the true scale of what was required was defined for the first time. Both the MVP 1/2 essential enhancements for the three areas were identified along with the non-essential, although very beneficial, MVP 3 enhancements. Appendix 2 clearly shows that the MVP 1/2 enhancements for SSRI, Prevention (primarily HSV) and Protection (primarily risk based inspection programme) without the associated costs of internal resourcing and workshops etc. amount to £0.985m. The additional MVP 3 products (customer service related) would cost an additional £0.148m. Total requirement to

deliver fit for purpose base system for prevention, protection and sharing of risk information risk information is therefore £1.094M.

Prevention: ESFRS has not invested in such a comprehensive CRM solution until now, which is configured and supported by third party IT specialists (such as telent and Tiscki). They have demonstrated an ability to deliver the critical functionality required of our systems in respect to prevention as well as protection and SSRI's through CRM enhancement that we simply cannot deliver in-house. We currently rely on an internal HSV database, that although was an innovative solution at the time, simply cannot provide the intelligence we require, is no longer fit for purpose leading to inaccuracies within data sets and an inability to accurately provide exception reports on how we target prevention resources to those most vulnerable. This makes it difficult to respond to government data requirements and evaluate our performance. Importantly we cannot fully support the delivery of the reviewed HSV policy that reflects the NFCC person centred approach and takes full cognisance of HMICFRS findings without the enhancements. The cost of the prevention MVP 1/2, excluding related costs is £0.338m.

Protection: The current CRM functionality is restrictive and does not support the modifications needed to deliver effectively against the risk based inspection policy that has been recently reviewed following the HMIFRS inspection recommendations and the findings of the two internal audit business safety compliance reviews (February 2019 and July 2020). It is likely that a common approach to risk based inspection methodology will emerge from the national standards board over the next year or so and that the requirements placed on the Service through the introduction of new fire safety legislation will require a more locally adaptive automated system as indicated in the fit for future report. The project delivery of the MVP 1/2 enhancements will provide a greater scope for local adaptations to the fields, automated triggers and access permissions, whilst ensuring that any future fundamental upgrades are more easily achieved by the provider ultimately ensuring a more sustainable cost effective platform over the longer term. The cost of the protection MVP 1/2, excluding related costs is £0.426m.

Sharing of Risk information: risk information is collected by a great many individuals undertaking prevention, protection and response activities. It is important that this information is recorded and also easily accessed at the appropriate time, by any member of staff, that is due to interact with an address or individual, which we have risk

information on, in order to minimise the risk to staff as set out in the Fire and Rescue Services Act 2004. The investment in the mobile data terminals (MDT's) provides a key point of access to this information for many front line staff but without the CRM enhancements we will continue to experience challenges around version control, sharing of information across borders, process failures (human errors) leading to delays in uploading critical risk information, and limitations in displaying information in the most effective way to aid timely dissemination of priority risk information. The cost of the risk information MVP 1/2, excluding related costs is £0.221m.

It would be very easy to overlook how important the exploratory work and business analysis has been in refining the critical functionality required from our CRM system and therefore the gravity of the impact these changes will have on:

- 1) the Service's ability to allocate critical prevention and protection resources to those most vulnerable in our communities through a risk based approach,
- 2) complying fully with our legal requirements and the ability to demonstrate that compliance,
- 3) ensuring risk critical information from any source is made available in the most efficient manner to ensure readiness for operational use,
- 4) ability to implement the IRMP fully.

Following the 14 month mapping exercise the CRM board chaired by the ACFO commissioned a review to establish whether the post workshop MVP requirements that were reviewed against findings of the HMI inspection and internal audits, were in fact required and represented value for money prior to making a decision to support and recommend the additional investment. The CRM board (9th November 2020) recommended SLT approve MVP1 and MVP2 for HSV and Business Safety enhancements subject to funding agreement and recommended a benchmarking exercise be carried out immediately.

A benchmarking exercise as a result of the project board decision has therefore been undertaken to evaluate the total proposed investment of the ESFRS CRM project against the benefits. Many Services in the sector, unsurprisingly, are effectively responding in a very similar way to the wider findings of the recent round of HMICFRS inspections, recommendations from the Hackitt review and the related planned legislative changes. The most comparable service

to ESFRS in terms of delivering a CRM project is Kent FRS and the benchmarking exercise has confirmed that the overall cost for implementation compares very favourably in respect to the investment we are proposing for the functionality that would be achieved.

Completion of the project enhancements will result in directly enabling 41% of the HMICFRS inspection identified improvements being addressed.

Delivery of the enhancements to Home Safety Visits and Business Safety will position the Service favourably to meet key objectives and associated expectations identified in the NFCC Fit for the Future report (February 2020), section 67.

Implementation of key aspects of the IRMP (Planning for a Safer Future IRMP – ESFRS March 2020) will be supported by the completion of the CRM enhancements. Refinements to how we allocate resources for prevention activity and improvements to targeting will be supported by the Community Safety enhancements within CRM (as referenced in page 30 of the document, Prevention – Our main areas of work for the next five years). Improvements to the risk-based inspection programme, allocation of resource for protection activity and enhanced targeting will be further supported through the enhancements to the Business Safety functions in CRM (referenced in page 34 Protection – Our main areas of work for the next five years). All enhancements support the IRMP objective of ‘...streamlining and digitising of key operational processes for Home Safety Visits, Business Safety Inspections and Site Specific Risk Information through the Customer Relationship Management system...’ as referenced on page 62 of the IRMP (March 2020).

The majority of the remaining actions that were identified through the internal audit report of Business Safety (2019/20) will be enabled by the completion of enhancements to the Business Safety element of CRM.

Business benefits have been documented in Appendix 3 by Minimum Viable Product (MVP) and identified as intangible or tangible benefits identifying cashable savings where applicable.

Additional government funding may become available in the future due to new fire service building and fire safety responsibilities, thus further reducing the required investment but this cannot be relied upon at this stage.

Financial Assessment

The agreed budget for this project is £0.750m. It has subsequently been supplemented by allocating a further £0.120m from the Protection Grants provided by Government and £0.005m income from Surrey CC bringing the total project budget to £0.875m.

If only MVP1 & 2 are approved the additional funding requirement amounts to £0.946m and if MVP3 is included for all enhancements, the additional funding requirement would be £1.094m.

£0.162m remains in the project budget however is insufficient to complete the project and realise the expected business benefits.

It should be noted that in relation to ongoing revenue costs there will be a £15,500 per annum ITG revenue pressure in 2021/22 following completion of enhancements.

However due to the cashable business benefits (Appendix 3) a £155,500 revenue per annum will be realised from 2022/23. This will equate to an overall revenue saving of £140,000 per annum from 2022/23, of which £90,000 per annum is new savings, the balance is where the project enables the delivery of an existing saving of £50,000, which was agreed as part of 2020/21 budget setting.

In considering options for funding the additional project costs we have selected those that utilise existing sources without the need either to borrow or to disinvest from other projects where funding has already been committed. On this basis it is recommended that the following sources of funding are approved to cover the additional MVP1 & 2 requirements:

- 2020/21 Revenue Budget Forecast underspend = £0.496m
- Improvement & Efficiency Reserve = £0.300m
- Business Rate Pool Reserve = £0.150m
- Total = £0.946m

There is clearly a risk that the current forecast revenue underspend may reduce but SLT will need to manage that risk. Should the underspend not deliver at its current level SLT could consider reallocating funding held in the Sprinkler Reserve of which £0.293m remains uncommitted, although it is recognised that this would require the Authority to agree this change to funding of a key policy priority.

There is also the potential that the BR Pool will generate additional income in 2020/21 with current forecasts indicating

approximately £0.200m which is not currently budgeted for and would be transferred to the BR Pool Reserve, however there is a risk that the impact of Covid-19 on BR income may reduce this further by year end. It is recommended that this income is used to fund the MVP3 enhancements. This income is not received until after the audit of the 2020/21 accounts (autumn 2021), however this should fit with the expected delivery profile of the project.

RECOMMENDATION

It is recommended that the Fire Authority:

- i. note the progress on the current SSRI development and completion of the upgrade to Dynamics 365 as part of the CRM project;
- ii. agree to the additional funding for the completion in full of the delivery of the MVP2 CRM modules (Prevention, Protection and Sharing Risk Information enhancements) at a cost of £0.946m funded by sources identified in the report;
- iii. agree to the additional funding for the completion of the MVP3 CRM modules (Prevention, Protection and Sharing Risk Information enhancements) at a cost of £0.148m from the source identified in the report; and
- iv. note the risks to the funding sources set out in the report and that should they crystalize then the Authority would need to consider reallocation of resources currently committed to other priorities.

1 INTRODUCTION

- 1.1 Following the successful upgrade from MS Dynamics 2011 in August 2020, ESFRS use Microsoft Dynamics 365 as its CRM platform. CRM is the primary technology platform for Business Safety. CRM is currently being developed to support the management of SSRI and is due to go live in March 2021.
- 1.2 This paper covers the proposal of developing CRM to support Community Safety including safeguarding and further enhancing its Business Safety capability to replace IT systems which are no longer fit for purpose and to improve alignment of IT with current Safer Communities business objectives and processes.
- 1.3 The purpose of this paper is to support a request for additional funding to complete project delivery in order to achieve project benefits through enhancements to Home Safety Visits and Business Safety functionality. Analysis of external and internal audits alongside gap analysis of current

business process has identified a real need for improving the IT platforms to deliver Safer Communities business outcomes.

1.4 **Why is there a need for additional funding?**

1.4.1 To deliver the upgrade from MS Dynamics 2011 to MS Dynamics 365 (step 1) the cost for development increased from the original budget of £0.3m to £0.4m. This was due to several factors:

- 1.4.2
- Additional effort to review CRM 2011 code libraries developed in house
 - Effort to complete remediation of code to Dynamics 365
 - Further effort to improve user interface following Microsoft restricting functionality used by ESFRS in its 2011 build.
 - Extended timeline to go live of the upgrade creating additional funding requirements to extend backfill resource whilst CRM System Administrator supported the upgrade work.

1.4.3 It has been 3 years since the Business Case was originally created. Since then and with the introduction of new project management processes by the PMO, the Service has matured in its approach to the creation of Business Cases including identifying savings and costs. In the intervening period since the Business Case was approved, the Service has also reviewed and identified additional business requirements. Changes to business process, national guidance, outcomes of the Grenfell Inquiry and updating the Risk Based Inspection Programme have all impacted on what is now deemed critical provision. To deliver against these new challenges the project has reviewed the business requirements and has identified that additional funding needed to complete the implementation of the CRM project and the related evolved MVP's for each provision.

1.4.4 The end product would be a crucial platform that would support CRM, enabling ESFRS to adapt CRM in terms of enhancing its ability to respond to the ever evolving requirements placed on the Service with regards to data provision, safeguarding, allocating prevention and protection resources to risk effectively and responding to national best practice, HMICFRS findings and changes in legislation. Our ability to evaluate our community impact is becoming more essential and to do so effectively requires an enhanced technological solution.

1.4.5 Based on the original business case funding, the project has been able to complete delivery of the upgrade to MS Dynamics 365 and progress the SSRI enhancement however there is a significant shortfall in funding to complete delivery of the Home Safety Visits and Business Safety enhancements as part of the project. Following completion of a series of business focused workshops and analysis, revised business processes have been agreed that will drive forward the efficiencies ESFRS is seeking.

1.4.6 Costed proposals have been provided by our CRM and IT suppliers which have been incorporated into the cost models in this paper (Appendix 2). To complete delivery of the enhancements the project is seeking additional funding to cover

the additional investment required of £0.946m. This is based on delivery of MVP1 and MVP2 for both HSV and BS enhancements.

- 1.4.7 The option also exists to deliver the CRM MVP3 enhancements across the three areas (SSRI, prevention and protection) although not essential in respect to legal compliance or critical delivery, these enhancements would bring significant benefits (detailed in Appendix 3) to the communities we serve. Including MVP3 in the ESFRS redesign and improvement of CRM will assist in meeting improved access to risk data and improved scheduling of supporting visits. It will provide more flexibility for the service to focus time on inspections with reduction in travel and administration tasks. The enhancements to the existing Business Safety functionality in CRM will improve alignment to the new risk based inspection programme automating the scoring of business safety risk onto premises, scheduling of premises visits, reminder notifications and improved reporting on business safety audits due to support management planning. CRM HSV BS and SSRI enhancements will ensure that ESFRS allocates its resources appropriately and prioritises activities that address the risks identified in its integrated risk management plan, station profile and annual assessment of risk, therefore providing a service that is more efficient and effective with resources that better respond to the risks in East Sussex
- 1.4.8 This additional set of CRM enhancements (inclusion of MVP3's) would require a further £0.148m of investment. A separate cost model is included in Appendix 2 showing the additional funds required to deliver MVP3, for all three enhancements, in addition to the funding required to deliver MVP1 and MVP2 for HSV and BS enhancements only.

1.5 **Benchmarking of CRM project with other FRS**

- 1.5.1 A benchmarking exercise has been undertaken to provide confidence to SLT that the approach taken for the ESFRS CRM project, its deliverables and associated costs compare favourably with the approach taken by other Fire & Rescue Services when addressing business requirements for SSRI, HSV and BS. The aim of the exercise was to evidence that the revised ESFRS CRM project funding request demonstrates value when comparing ESFRS' business requirements with similar approaches, deliverables and scope.
- 1.5.2 It is apparent that the HMICFRS inspection regime has resulted in fire services' drive to invest in CRM as a means to addressing areas of improvement identified during inspections e.g. risk information management. The other major drivers are changes in legislation driven by Grenfell and initiatives such as the NFCC Fit for the Future consultation.
- 1.5.3 The benchmarking exercise involved calls with relevant stakeholders at Kent FRS, Surrey FRS, West Sussex FRS and Merseyside FRS.
- 1.5.4 In summary it is apparent there are two approaches taken by the FRS's consulted:

1. Microsoft Dynamics CRM & Configuration (COTS)

- ESFRS and Kent FRS have both taken the approach of building on existing investments in the Microsoft Dynamics CRM (Commercially off the Shelf) platform.
- Both services have conducted detailed business process reviews in the areas of SSRI, HSV and Business Safety mapping out existing and the desired new business processes.
- Both services have contracted Dynamics CRM third party technical consultancies to work with business stakeholders to configure and implement the new processes (Kent – Hitachi & ESFRS – telent/Tiski).
- Similarly both services have adopted an agile development approach to ensure that the new functionality is delivered in the timely and staged manner.
- Both services have adopted principles to ensure the digitisation of existing processes, minimising data entry, improving the quality, accuracy and the timeliness of information delivered to front line colleagues.
- The budgets that ESFRS and Kent FRS have allocated are comparable, with Kent FRS investing £1.9M and ESFRS investing up to £1.95M in one-off project cost. Note that ESFRS investment includes backfill costs of £86k.
- Both services will continue to use their respective third party technology partners to support and maintain the systems.

2. Software Package Solutions (COTS)

- Merseyside FRS have during the last five years used an in-house development approach, directly employing IT developers. However due to issues with staff retention in the IT development team and the slow progress of their internal software development, Merseyside FRS have now decided to cease internal development and implement CFRMIS a software package solution for technical fire safety, community fire safety and risk information. The acceleration of Merseyside FRS CRM project is also closely linked to the requirement to address issues raised by the HMI audit.
- Merseyside FRS undertook a high level review of business requirements and accelerated their procurement process, choosing not to undertake a detailed mapping of future business processes.
- West Sussex FRS have implemented FARYNOR a software package solution for risk management, including home and community fire safety processes, plus operational risk assessment. West Sussex FRS' priority was to purchase FARYNOR in order to provide a package solution for risk information management.
- West Sussex FRS are also looking at the possibility of using another FARYNOR software module for Water Management.

1.5.5 Surrey FRS currently use a legacy Dynamics CRM solution supported by IBM and are about to start a project to assess whether to upgrade the IBM Dynamics CRM solution or instead purchase a software package solution such as FARYNOR. Surrey FRS have requested a demonstration of the ESFRS CRM system as part of their evaluation process.

1.5.6 Kent FRS

In the case of Kent FRS their key objective was to manage all risks through one platform whereas previously they had a mix of CRM platforms for different functions. During our discussions it became clear that it was their CRM project that was driving the benefits rather than the business although the end result is bringing in efficiencies to their ways of working.

Kent FRS is the most similar to ESFRS in terms of approach and delivery of CRM through developing MS Dynamics 365 platform with an external partner. As part of their project they undertook market research in regard to the right COTS application and this research confirmed, as it did for ESFRS, that CRM was the right product.

- Overall project cost compares favourably to ESFRS with a value of £1.9m
- Business analysis effort was through contractor resource for a year at £0.1m
- Microsoft licensing cost is higher (£0.25m) than ESFRS due to their use of Windows 10 hardware
- Development costs £1.8m

1.5.7 Surrey FRS

Surrey FRS have been using a legacy Dynamics CRM solution supported by IBM for several years. Business requirements had previously been undertaken during early stages of their transformation programme and it was confirmed during our meeting that key benefits and scope were very similar to East Sussex FRS own requirements. No development work is currently underway although Surrey are about to start a project to assess the approach they want to take, develop further on the Dynamics CRM platform or move to a packaged solution.

No costs have been shared with ESFRS at this stage.

1.5.8 Merseyside FRS

Following five years of development using an in house development team Merseyside FRS decided to move forward with a packaged solution called CFRMIS. This was driven by the need to address issues raised by the HMICFRS inspection. Although high level business requirements were used to inform the choice of software package procured, there was no detailed analysis of business aimed at driving efficiencies for the service.

Due to commercial confidentiality, no costs were shared with ESFRS.

1.5.9 West Sussex FRS

WSFRS are currently in the closing stages of a project to implement FARYNOR. The service has already gone live with Prevention & Protection functions, and are working on delivery of the Operational Risk elements by the end of March 21.

To complete delivery of FARYNOR including licensing and provision of Windows10 touchscreen laptops for appliances WSFRS budgeted £0.2m one off project cost, with an ongoing licensing cost in future years of £0.023m. The ongoing licensing cost has been offset by savings from decommissioning of their legacy solution.

2 DELIVERING ESFRS OUTCOMES

2.1 HMICFRS Inspection Outcomes

2.1.1 The table at Appendix 5 and outlined below shows the actions from the HMICFRS Inspection report 2018/19 mapped against areas of CRM development MVPs critical to delivering the required improvements highlighted in the HMICFRS report. It should be noted that **41%** of the inspection outcomes will be supported by the CRM project once it has fully delivered the business case objectives. Details of how each of the outcomes is addressed by the CRM enhancements can be found in Appendix 1.

2.1.2 The action plan 'HMICFRS action plan record v5' has been reviewed to identify if other areas not mentioned in the HMICFRS outcomes table are relevant to this document. Dashboard and reporting improvements to be delivered as part of the enhancements for SSRI, HSV and BS will support action plan ID 4 and ID 10.

2.1.3 ID 4 refers to the Risk Based Inspection Programme and this will be supported by improvements to the CRM dashboards for Business Safety on completion of this enhancement.

2.1.4 ID 10 refers to improved SSRI dashboard reporting enabling managers to see progress on the numbers and types of visits being undertaken.

2.1.5 Additionally, improvements in the identification of High Risk premises under ID 23 will be supported by the completion of SSRI and Business Safety enhancements.

2.2 NFCC Fit for the Future

2.2.1 The NFCC Fit for the Future report dated February 2020 discussed how through a series of improvement objectives could provide a national 'sense of direction' for Fire and Rescue Services in England. This document looks at central guidance, development of standards, audit and inspection, pay and conditions and service funding and investment.

- 2.2.2 **Improvement objective 4 in Appendix C** of the report, **section 67** states...*'Maximum use of new technology and data management needs to be exploited to address the issue of building safety. To simplify the inspection process, ease the burden on newly qualified inspectors, and to align to other parts of the building regulations system, data about building risks needs to be standardised and inspection processes digitised.'*
- 2.2.3 The development of the CRM platform and SSRI module alongside the related enhancements to Home Safety Visits and Business Safety will provide a central repository of information related to ESFRS activity based on premises and individuals, improving the ability to share and access information across departments. This will also result in better validation and quality of data through the use of mobile devices to collect information electronically.
- 2.2.4 Electronic business workflows embedded in CRM will support the automation of business process and risk calculations which will improve capability to help standardise the process of completing and managing premises visits including supporting calculation of visit outcomes. The digitalisation of business processes will guide inspectors through the completion of audit processes and any follow up activities.
- 2.2.5 **Section 66** states....*The volume of inspection work that is likely to be needed to support the ongoing review of building safety is going to be significant. Fire services are going to need to gather intelligence about the risks in their area and identify the priorities for inspection and, potentially, enforcement action in a new regulatory environment. Then a programme of inspections will need to be put into place aligned with the priorities to gather further data and aid decision making.'*
- 2.2.6 The ESFRS implementation of CRM will also assist in meeting this through improved access to data and improved scheduling of visits. It will also provide more flexibility for the service to focus time on inspections with reduction in travel and administration tasks.
- 2.2.7 Further funding may be available to ESFRS under Fire Safety and Building Safety legislation and as a consequence there may be an opportunity to redistribute any future funding to support this project retrospectively.
- 2.3 **Internal Audit Reports – Business Safety**
- 2.3.1 Internal Audit undertook a review of Business Safety in February 2019 with a follow up report published in July 2020.
- 2.3.2 **Finding 1 – Overdue Inspections**, in the July 2020 report relating to frequency of inspection visits for premises with a risk score of 5 or greater.
- 2.3.3 This will be addressed through the implementation of the Business Safety enhancements within the CRM project.

2.3.4 The enhancements to the existing Business Safety functionality in CRM will improve alignment to the new risk based inspection programme automating the scoring of business safety risk onto premises, scheduling of premises visits, reminder notifications and improved reporting on business safety audits due to support management planning.

2.3.5 **Finding 6 Duplicate Records** and **Finding 7 Data Input Quality** of the Internal Audit report 2020

2.3.6 As part of Business Safety enhancements, duplicate detection and consolidating records will mitigate the current issue of duplicate records held within CRM database. Data quality will be improved through the use of data validation in electronic forms and through reduction of errors transferring information from paper forms to the CRM system.

3 BENEFITS REALISATION

3.1 Safer Communities were tasked with reviewing the principles that should drive the CRM project forward. Although these are identified in more detail in Appendix 4, in summary the principles stated that CRM should be intuitive to use, paperless, enable remote working, be as automated as possible, enable agile working methods (technology and resourcing), link between functions of SSRI, Business Safety and Community Safety and provide improved data quality and reliability.

3.2 Appendix 3 highlights the business benefits that will be delivered through the completion of all SSRI, HSV and BS enhancements. The benefits are identified by MVP and whether they are cashable or non-cashable in form.

3.3 Tangible benefits that will be realised on completion of the project include:

1. Full legal compliance in respect to RRO, addressing the shortfalls identified within internal audit and HMICFRS findings.
2. Support full implementation of the IRMP.
3. Demonstrate an effective response to the Fit for future improvement objectives through effective investment in digital technology.
4. The ability to adapt to new legislation requirements under building and fire safety bills.
5. The ability to deliver the reviewed risk based inspection programme which currently is made more difficult as the current CRM system does not accommodate the updated process.
6. Ability to deliver the reviewed HSV policy which currently we cannot deliver through the existing HSV database. This would be incorporated in the planned CRM HSV enhancement.

7. Points 3 & 4 are essential to our ability to demonstrate we are allocating both prevention and protection resources to risk, in line with the reviewed RBIP and HSV policies. Targeting the most vulnerable and being able to detail how many we have visited in each category together with the outcomes and the evaluations.
8. Increase in audit capacity from 750 to 1,500 targeting those most vulnerable within 18 months of changes taking effect.
9. Maintain the HSV/S&W capacity of 10,000 visits with reduced specialist staffing (12 down to 6.8) providing a significant reduction in being able to lone work and significant increase in length of time for a visit due to targeting most vulnerable (safeguarding referrals, complex needs).
10. All very high and high risks to be visited by crews as per policy with none outstanding on the backdrop of a rise in premises needing a visit due to the Building Risk Review work (greater visibility of risk in built environment).
11. All SSRIs with a tolerable risk level are automatically published to MDTs within 5 minutes of completion. Current manual process of approval takes between 1-7 days before reaching the MDTs. All new low, medium & high risk SSRI's (or an update with a change in risk level) will require Station Manager approval will be automatically referred to a station manager if not progressed within 48hrs.
12. Gives ESFRS the ability to provide full return to central government on required metrics, which currently is not achievable with the existing system.
13. Other benefits would potentially include:
 - All prohibitions revisited in 12 months
 - All complaints addressed within the policy requirements (4 levels)
 - Consultations responded to within stipulated timeframes.
 - Improved delivery of exception reporting from CRM enhancements will comply with HSV policy

3.4 The overall annual cashable saving has been calculated to amount to £155k from the 2022/23 financial year. This consists of a reduction in roles through forecast retirements and other efficiencies identified as part of the analysis around SSRI, Prevention and Protection functions.

3.5 In terms of role reduction it has been identified that a saving of 5 x FTE would be realised in 2022/23 giving an annual cash saving of £120k. An additional

3.6 Additional savings will be realised through a gradual reduction in overtime amounting to £25k from 2022/23 and a reduction in paper and offsite storage costs of £10k from 2022/23

3.7 SSRI

3.7.1 The completion and rollout of the SSRI development will effectively reduce the need for compiling, collating and assuring the data. Further efficiencies will come through a reduction in administration and return of data sets that are incomplete and remove the revisits of staff allowing focus on other prevention activity. The removal of paper based records and the associated requirement of duplicate entry from paper to electronic records with a reduction in printing and stationary costs will further support the savings in this area of the business.

3.8 Home Safety Visits

3.8.1 With the advent of the HSV development and links to Corporate Gazetteer, the creation of an HSV from phone calls and referrals is expected to save 250 hours effort per month. A further saving will be realised through the reduction in effort associated with completing/updating a manual HSV form (CS1) releasing at least 140 hours per month for other tasks. Through the use of the scheduling tool it is expected further efficiencies will be available through a reduction in travel time saving approximately 140 hours per month.

3.9 Business Safety

3.9.1 With the completion of the enhancements on CRM for Business Safety, a range of efficiencies will be realised. Revised business processes and new technology will result in business processes being streamlined.

3.9.2 With the advent of mobile data collection, duplicate data entry is removed resulting in time and cost savings. Currently there are on average 200 new premises records created manually on CRM however electronic data entry will allow data to be entered only once into CRM with an expected reduction in effort of 200 hours per month. The development of an automated prohibition scoring tool, the creation of Fire Investigation reports and notices on CRM together with scheduling of visits into calendars will all bring additional efficiencies. This will all strengthen the opportunity to consolidate practices across the Service.

3.9.3 The completion of the CRM project will bring in scheduling improvements which will considerably reduce the current effort (approximately 5 days per month) to create and schedule Operational Business Safety Visits (OBSV). Electronic data capture will also reduce duplicate entry for OBSV's helping to release administration staff for other protection activities.

4 FINANCIAL ASSESSMENT

4.1 The agreed budget for this project is £0.750m. It has subsequently been supplemented by allocating a further £0.120m from the Protection Grants

provided by Government and £0.005m income from Surrey CC bringing the total project budget to £0.875m.

4.2 The completion in August 2020 of the upgrade of CRM to Dynamics 365 utilised £436k of the original project budget. The cost to develop SSRI was approved at the August 2020 project board and as discussed elsewhere in this document is well progressed. The tables below highlight the committed spend (original budget and Protection Grant) with the total forecast project spend. If only MVP1 & 2 are approved the additional funding requirement amounts to £0.946m and if MVP3 is included for all enhancements, the additional funding requirement would be £1.094m.

4.3 £0.162m remains in the project budget however is insufficient to complete the project and realise the expected business benefits. This will be used alongside any approved additional funding to complete the delivery of the HSV and BS enhancements. If the additional funding is not approved the remaining project budget will be reallocated.

4.4 It should be noted that in relation to ongoing revenue costs there will be a £15.5k per annum ITG revenue pressure in 2021/22 following completion of enhancements.

4.5 **Current Project Budget snapshot (January 21)**

Approved funding to date	project	Committed spend to date	project	Current available funds in budget
£875,423		£713,523		£161,900 Allocated to HSV & BS

Note 1: Approved funding: IT Strategy £870,000 (inc. £120,000 Protection Grant) & Surrey Collaboration CRM review £5,423

Note 2: Current available project budget funds of £161,900 are taken into account as part of the additional funding requirement.

4.6 **TWO OPTIONS FOR ADDITIONAL FUNDING**

4.6.1 **Option 1 - Additional Funding Requirement - One off Project Costs (SSRI, HSV, BS - MVP1&2 only)**

Additional Funding Requirement	Overall Forecast Project Spend including approved to date and required funds
£945,742	£1,821,165

4.6.2 **Option 2 - Additional Funding Requirement - One off Project Costs (SSRI, HSV, BS - MVP1,2 & 3)**

Additional Funding Requirement	Overall Forecast Project Spend including approved to date and required funds
£1,093,395	£1,968,818

Note 1: Costs for MVP 3 are valid at this date, if the decision as whether to progress is significantly delayed a new quote will be required.

4.7 Ongoing Revenue Costs (2020-2025) for Live System

	Year 20/21	Year 21/22	Year 22/23	Year 23/24	Year 24/25
Ongoing IT revenue costs	£154,973	£154,973	£154,973	£154,973	£154,973
Source of funding ITG budget	£139,461	£139,461	£139,461	£139,461	£139,461
IT Revenue Shortfall	£15,512	£15,512	£15,512	£15,512	£15,512

Note 1: Ongoing revenue costs funded by ITG revenue budget, additional £15.5k of ITG funding required for 2020/21 onwards

4.8 Cashable Business Benefits (2020-2025)

	Year 20/21	Year 21/22	Year 22/23	Year 22/24	Year 24/25
Headcount Reduction (5 x FTE)	n/a	n/a	£120,000	£120,000	£120,000
Overtime Reduction	n/a	n/a	£25,000	£25,000	£25,000
Paper & Offsite Storage	n/a	n/a	£10,000	£10,000	£10,000
Total Saving PA	n/a	n/a	£155,000	£155,000	£155,000

Note 3: of the saving resulting from the 5 FTE reduction £50,000 is an existing saving agreed as part of 2020/21 budget setting and the balance is a new saving.

4.9 In summary the cashable business benefits (Appendix 3) a £155,500 revenue per annum will be realised from 2022/23. This will equate to an overall revenue saving of £140,000 per annum from 2022/23, of which £90,000 per annum is new savings, the balance is where the project enables the delivery of an existing saving of £50,000, which was agreed as part of 2020/21 budget setting.

4.10 In considering options for funding the additional project costs officers have selected those that utilise existing sources without the need either to borrow or to disinvest from other projects where funding has already been committed. On this basis it is recommended that the following sources of funding are approved to cover the additional MVP1 & 2 requirements:

- 2020/21 Revenue Budget Forecast underspend = £0.496m
- Improvement & Efficiency Reserve = £0.300m
- Business Rate Pool Reserve = £0.150m
- Total = £0.946m

4.11 There is clearly a risk that the current forecast revenue underspend may reduce but SLT will need to manage that risk. Should the underspend not deliver at its current level SLT could consider reallocating funding held in the Sprinkler Reserve of which £0.293m remains uncommitted, although it is recognised that this would require the Authority to agree this change to funding of a key policy priority.

4.12 There is also the potential that the BR Pool will generate additional income in 2020/21 with current forecasts indicating approximately £0.200m which is not currently budgeted for and would be transferred to the BR Pool Reserve, however there is a risk that the impact of Covid-19 on BR income may reduce this further by year end. It is recommended that this income is used to fund the MVP3 enhancements. This income is not received until after the audit of the 2020/21 accounts (autumn 2021), however this should fit with the expected delivery profile of the project.

Appendix 1 – HMICFRS Inspection Outcomes and impact of CRM Project

EFFECTIVENESS	SSRI	HSV	BS
<u>Understanding the risk of fire and other emergencies</u>			
<ul style="list-style-type: none"> The service should ensure its firefighters have good access to relevant and up-to-date risk information. 	MVP1		
<ul style="list-style-type: none"> The service should ensure it shares risk information consistently across the service. 	MVP1		
<u>Preventing fires and other risks</u>			
<ul style="list-style-type: none"> The service should ensure it carries out home safety visits in a timely manner. 		MVP1	
<ul style="list-style-type: none"> The service should evaluate its prevention work, so it understands the benefits better. 		MVP1	
<u>Responding to fires and other emergencies</u>			
<ul style="list-style-type: none"> The service should improve the availability of its on-call fire engines to respond to incidents. 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should ensure firefighters have good access to relevant and up-to-date risk information. 	MVP1		
<u>Protecting the public through fire regulation</u>			
<ul style="list-style-type: none"> The service should ensure that its risk-based inspection programme targets its highest-risk premises. 			MVP1 & MVP2
<ul style="list-style-type: none"> The service should ensure it addresses effectively the burden of fire false alarms (termed 'unwanted signals'). 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should ensure it has effective arrangements for providing specialist protection advice out of hours. 	N/A	N/A	N/A
<u>Responding to national risks</u>			
<ul style="list-style-type: none"> The service should ensure firefighters have good access to relevant and up-to-date risk information including cross-border risks. 	P21	N/A	N/A
<ul style="list-style-type: none"> The service should ensure it is well-prepared to form part of a multi-agency response to a terrorist-related incident and that its procedures for responding are understood by all staff and are well tested. 	N/A	N/A	N/A

EFFICIENCY	SSRI	HSV	BS
<u>Making best use of resources</u>			
<ul style="list-style-type: none"> The service needs to ensure that it allocates its resources appropriately and prioritises activities that address the risks identified in its integrated risk management plan. 		MVP1	

PEOPLE	SSRI	HSV	BS
<u>Promoting the right values and culture</u>			
<ul style="list-style-type: none"> The service should make sure its values and behaviours are understood and demonstrated by all staff. 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should have effective means to monitor the working hours of its staff. 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should develop a workforce plan that takes full account of the necessary skills and capabilities it needs to carry out its integrated risk management plan. 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should ensure it takes timely action in response to feedback or concerns from its staff. 	N/A	N/A	N/A
<ul style="list-style-type: none"> The service should ensure it has mechanisms in place to manage and develop talent within the organisation. 	N/A	N/A	N/A

Appendix 2 – Cost Models

Table 1 - Delivery of MVP1 and MVP 2 only for SSRI, HSV and BS

Cost element	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5
	£	£	£	£	£	£
One off costs / (saving):						
CRM Upgrade WP1	436,485					
SSRI Enhancement (Costed Proposal)	220,038					
HSV Enhancement (MVP 1 & 2)	338,855					
Resource Backfill for HSV	17,500					
Business Safety Enhancements (MVP 1 & 2)	426,339					
Resource Backfill Extension	35,750					
Enhancement Workshops	24,202					
BlueLight Integration Enhancement	78,000					
Mobile Devices	46,150					
Collaboration	10,846					
Integration to Mobilisation System (Estimate)	80,000					
Business Analysis Resource (6 Months from Apr21)	50,000					
Business Analysis Resource (Dec20-Mar21 PMO transfer)	57,000					
Total one off costs / (saving):	1,821,165	0	0	0	0	0
Surrey Contribution to Collaboration	5,423					
Protection Grant	120,000					
CRM Business Case agreed funding 2018	750,000					
Less source of funding	875,423					
Total net one off costs / (saving):	945,742	0	0	0	0	0
On-going costs / (savings):						
Tablet Support 71 devices @ £20 per device		1,420	1,420	1,420	1,420	1,420
License for additional users		62,246	62,246	62,246	62,246	62,246
Support Cost Uplift all modules (Estimated)		88,137	88,137	88,137	88,137	88,137
telent application support		3,170	3,170	3,170	3,170	3,170
Total on-going costs / (savings):		154,973	154,973	154,973	154,973	154,973
Agreed 2019 Star Chamber Device Support cost		1,650	1,650	1,650	1,650	1,650
Agreed 2019 Star Chamber Microsoft License cost		49,513	49,513	49,513	49,513	49,513
Agreed 2019 Star Chamber Microsoft Field License		25,000	25,000	25,000	25,000	25,000
Agreed 2019 Star Chamber Platform Support cost		55,700	55,700	55,700	55,700	55,700
Agreed 2019 Star Chamber telent Support cost		3,170	3,170	3,170	3,170	3,170
Agreed 2019 Star Chamber Stream Cost		4,428	4,428	4,428	4,428	4,428
Less source of funding		139,461	139,461	139,461	139,461	139,461
Total net on-going costs / (saving):		15,512	15,512	15,512	15,512	15,512
Grand Total	945,742	15,512	15,512	15,512	15,512	15,512

Table 2 - Additional costs for delivery of MVP3 for SSRI, HSV and BS

Cost element	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5
	£	£	£	£	£	£
One off costs / (saving):						
SSRI Enhancement (MVP 3 only)	85,954					
HSV Enhancement (MVP 3 only)	30,202					
Business Safety Enhancements MVP 3 only)	31,497					
Total one off costs / (saving):	147,653	0	0	0	0	0
Total net one off costs / (saving):	147,653	0	0	0	0	0

Note: Ongoing costs remain as shown in Table 1

Appendix 3 - BUSINESS BENEFITS by Minimum Viable Product

A further review and analysis of benefits has been undertaken with additional cashable (tangible) and non-cashable (non-tangible) benefits identified.

Site Specific Risk Information (SSRI)

The CRM project board approved the development of SSRI MVP1 and MVP2 on 4 August with development commencing on 6 October.

The completion and rollout of the SSRI development will effectively reduce the need for compiling, collating and assuring the data. Further efficiencies will come through a reduction in administration and return of data sets that are incomplete and remove the revisits of staff allowing focus on other prevention activity. The removal of paper based records and the associated requirement of duplicate entry from paper to electronic records with a reduction in printing and stationary costs will further support the savings in this area of the business.

Minimum Viable Product 1

Development of MVP1 focuses on the creation of a new electronic SSRI data capture form using the existing format, including automatic risk level calculation, Station Manager approval process and publication to existing MDTs.

Benefits	Non-Cashable	Cashable
Realisation of resource efficiency and process optimisation.		x
Reducing delays processing SSRI information and publishing/communicating risk in shorter timescale	x	
Assurance of audit and correct collation, processing and retention of data.	x	
Reducing risk to operational personnel by ensuring premises risk information is available to operational personnel within shorter timeframes	x	
Errors in data entry and the potential for missing information, requiring premises visit follow up to capture.		x
Structured data capture	x	
Integrated communication tools and productivity tools.	x	
Improved capability to target resources based on local risk profiles.	x	
Lower risk exposure of IT application failure through Improved ability to provide support for underlying IT application.	x	

Ensuring that disruption in processing SSRI because of IT failure is reduced.	x	
Improve quality of data	x	
Standardised processes throughout the enterprise	x	
Standardised operational training	x	

Minimum Viable Product 2

Development of MVP2 expands on MVP1 delivering the new MDT SSRI format with imagery, recording of visit times and attendees, dashboards, audit history and the introduction of mobile data collection devices.

Benefits	Non-Cashable	Cashable
Resource efficiency from eliminating requirement for double entry of data.		x
Resource efficiency from eliminating requirement for error correction and manual validation.		x
Decrease timeframe for communicating risk information as a result of current manual process.	x	
Improved visibility of the data through better dashboard & reporting capabilities	x	
Reduction of paper & printing including filing and archiving		x
Improve security of data and compliance with GDPR regulation.	x	
Improved readability of risk information on MDT	x	

Minimum Viable Product 3

Development of MVP3 expands further on previous MVPs to include automatic removal after expiry date of arson/fire setter SSRI's, bulk import of SSRI's from 3rd party, transfer of SSRI's between addresses, notification of new, inactive SSRI's to JFC and Station Managers/Safeguarding notification of published SSRI's

Benefits	Non-Cashable	Cashable
Reduction on administration time to manually remove Fire setter/Arson SSRI risks		x
Reduction in administration time for creating SSRI records from 3 rd parties by use of bulk upload functionality		x
Improved stakeholder notification of SSRI publication	x	
Improved notification of new and inactive SSRI status to JFC	x	

Reduction in administration time maintaining transfer of SSRI between addresses (e.g. Community Safety risk)		x
Improvement and ability to predict potential SSRI's and prioritisation	x	

Home Safety Visits (HSV)

As a result of the savings mentioned below overtime costs will gradually be reduced by £25k annually.

With the advent of the HSV development and links to Corporate Gazetteer, the creation of an HSV from phone calls and referrals is expected to save 250 hours effort per month. A further saving will be realised through the reduction in effort associated with completing/updating a manual HSV form (CS1) releasing at least 140 hours per month for other tasks. Through the use of the scheduling tool it is expected further efficiencies will be available through a reduction in travel time saving approximately 140 hours per month.

Minimum Viable Product 1

Development of MVP1 includes the introduction of mobile data capture for all visits and Coming to Notice forms and processing an HSV request with record creation. Additionally this development will introduce automatic risk assessment, automated notifications and setting of post visit tasks and the creation of reports and dashboard views.

Benefits	Non-Cashable	Cashable
Improved capability to undertake additional targeted campaigns.	x	
Frees up operational personnel enabling targets from station annual assessment of risk to be met.	x	
Improved ability to share information across the service, providing enhanced transparency.	x	
Reduction in error correction activity enabling more time to undertake other tasks.		x
Reduction in overtime costs due to elimination of double entry of data and associated error correction activity.		x
Potential reduction in agency staff numbers through introduction of more efficient processes.		x
Improved visibility of historic customer information	x	
Improved audit trail through documentation of calls and actions	x	
Improved accuracy and consistency of risk levels through automatic risk calculation	x	

Increased security through restricted access to sensitive information and information not transported or residing in email accounts	x	
Improved data quality and consistency through electronic capture and validation of HSV data on mobile device	x	
Improved management information through automatic time recording	x	
Reduced time and effort with automatic creation of low risk SSRIs		x
Reduced admin time – 10000+ HSVs a year automatically recorded on the system without manual transfer		x
Reduced cost for archiving of paper HSV forms by 3rd party supplier		x
Improved customer service through address search facility for online forms		x

Minimum Viable Product 2

Development of MVP2 focuses on bringing wider notification to external agencies and improved customer reminders into scope, scheduling of bookings on mobile devices and automated risk assessment for online HSV requests.

Benefits	Non-Cashable	Cashable
Reduced admin time through automatic routing of responses from external agencies		x
Increased efficiency through HSV re-scheduling on mobile device		x
Increased efficiency through 'paused' jobs automatically added back to booking list	x	
Increased efficiency through automatic re-visit scheduling for high and very high risk HSVs	x	
Reduction in effort due to removal of double entry of data.		x
Improved audit trail through automation of reminders and scheduling.	x	
Improved accuracy of data resulting in less data correction	x	

Minimum Viable Product 3

Development of MVP3 brings in online requests processing, enhanced CSE forms and emailing functionality and 'self-service' scheduling for HSV visits.

Benefits	Non-Cashable	Cashable
Improved customer service and reduced admin time with online self-serve HSV's		x
Reduced admin with automated address matching for online HSV requests		x
Increased efficiency and security through online requests from agencies for enhanced HSVs automatically added to restricted booking list		x
Improved customer service through text messaging for notifications	x	
Improved customer service through online cancellations for HSV visits	x	
Reduced admin time through automated return of NHS CSE forms		x
Portal provides additional channel communication with all in the community	x	

Business Safety (BS)

With the completion of the enhancements on CRM for Business Safety, a range of efficiencies will be realised. Revised business processes and new technology will result in business processes being streamlined.

With the advent of mobile data collection, duplicate data entry is removed resulting in time and cost savings. Currently there are on average 200 new premises records created manually on CRM however electronic data entry will allow data to be entered only once into CRM with an expected reduction in effort of 200 hours per month. The development of an automated prohibition scoring tool, the creation of Fire Investigation reports and notices on CRM together with scheduling of visits into calendars will all bring additional efficiencies. This will all strengthen the opportunity to consolidate practices across the Service.

The completion of the CRM project will bring in scheduling improvements which will considerably reduce the current effort (approximately 5 days per month) to create and schedule Operational Business Safety Visits (OBSV). Electronic data capture will also reduce duplicate entry for OBSV's helping to release administration staff for other protection activities.

Minimum Viable Product 1

Development of MVP1 focuses on requests, visits, notices and reports. This MVP will enhance the existing Business Safety functionality within CRM and will bring in mobile data capture for visits, automated prohibition scoring tool, the creation of Fire Investigation reports and notices on CRM together with scheduling of visits into calendars.

Benefits	Non-Cashable	Cashable
Improved efficiency and process optimisation enabling reduction in admin hours		x
Increased efficiency enabling potential reallocation of resources to other tasks		x
Improved customer facing experience setting a more professional standard for ESFRS	x	
A central repository for ESFRS data for: <ul style="list-style-type: none"> • Prevention – HSVs • Protection – Fire Safety Regulation • Response – SSRIs • Fire Investigations • Rising Mains 	x	
Ensuring a joined up approach to the consistent management of data and a holistic oversight of risk across the Service	x	
Reduced delays in processing BS information	x	
Assurance of audit and correct collation, processing and retention of data.	x	
Reduction in errors in data entry reducing need for premises visit follow up		x
Improved reporting capabilities through structured data capture and storage	x	
Reduction in time and effort in improved capability to reuse existing data		x
Improved capability to target resources based on improvements to prioritisation	x	
Greater consistency through automated risk calculation	x	
Harmonisation of processes throughout the enterprise	x	
Elimination or reduction in use of paper based processes through mobile data capture		x
Eliminating costs of archiving paper records by third party		x
Improve security of data and compliance with GDPR regulation	x	

Minimum Viable Product 2

Development of MVP2 expands functionality further with the capability to raise complaints and requests through an online form with associated automated processing, non-compliance report, sanctions calendar and scheduling of visits to mobile devices.

Benefits	Non-Cashable	Cashable
Improved customer experience through online submission of complaints and advice requests	x	
Enhanced decision making through electronic sanctions calculator	x	
Increased efficiency through ability to book future audits on mobile device while at a premises	x	

Minimum Viable Product 3

MVP3 introduces internal and customer facing reminders, and prepopulated emails from within an interaction.

Benefits	Non-Cashable	Cashable
Increased efficiency through automated reminders		x
Increased efficiency through automated population of details into email templates		x

Appendix 4 – CRM Strategic Requirements

As part of the initial analysis phase of the project prior to undertaking the workshops to drive out the new more efficient business processes the business provided a view on the strategic requirements that would be underpinned by the development of the CRM system.

At a high level these included:

- Paperless
- Intuitive
- Automated
- Completely Agile
- Links & availability
- GDPR Compliance
- Performance/exception reporting
- Quality Assurance
- Equality Impact
- Robust and reliable

CRM Requirements



- | | |
|---|--|
| ■ property type FSEC/Experian | ■ IRMP/Political Steer |
| ■ Staff Away Day + Annual Partnership Event | ■ Enforcement History by property and individual |
| ■ Risk of Modern Slavery and Immigration issues | ■ Insurance Loss |
| ■ Incident History | ■ Occupancy Experian |
| ■ Property Use | ■ Property Type |

Appendix 5 – Supporting Documents

Internal Audit Report July 2020



**Business Fire Safety
Follow-Up - Final.p**

NFCC Fit for the Future



**Item 9 - Appendix
C - Fit for the futu**

HMICFRS Inspection Report 2019



**east-sussex-fire-an
d-rescue-service-rep**