



**SUBJECT: Customer centric digital architecture review**

**TO: Corporate Services, Strategy, Risk & Accountability Cttee.**

**FROM: Burlington Digital Service**

Report Number: BDS-04-23

Wards Affected: All

File Numbers: 200-03

Date to Committee: March 29, 2023

Date to Council: April 18, 2023

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**Recommendation:**

Endorse the Customer Centric Digital Architecture Blueprint contained in Appendix A of report BDS-04-23, including next steps and the CRM Implementation Roadmap inclusive of option 3 of the KPMG report to proceed to adopt and migrate to a new Customer Relationship Management (CRM) platform and;

Direct the Executive Director of Digital Service and Chief Information Officer to develop plans to achieve the blueprint and verify the approach for the new CRM platform with a report back to Council in Q3 2023 and;

Direct the Chief Financial Officer to review and report back in advance of the 2024 Budget on the multi-year capital and operating requirements and impacts of the CRM Implementation Roadmap.

**PURPOSE:**

This report is a follow-up to the CX-01-23 staff report on the Enterprise Web Architecture Review from KPMG completed through the provincial Audit and Accountability Fund. The KPMG Enterprise Web Architecture Review provided several options for the City to consider for enhancing and modernizing the current customer-facing technology applications and platforms. Staff have analyzed the KPMG report and agreed with the findings. Staff augmented KPMG with other known requirements and viewpoints, resulting in a blueprint of the City's Customer Centric Digital Architecture. After assessing the three options proposed by KPMG regarding the City's Customer

Relationship Management system (CRM), staff recommend proceeding with option 3 to adopt and migrate to a new CRM platform.

### **Vision to Focus Alignment:**

- Deliver customer centric services with a focus on efficiency and technology transformation.

### **Executive Summary:**

A collaborative and cross-departmental City of Burlington team was established to consider and analyze a recent Enterprise Web Architecture Review report from KPMG (staff report CX-01-23).

The team has analyzed the KPMG report and agreed with the findings and suggested options. Staff added the City's viewpoints and constructed a blueprint of the City's Customer Centric Digital Architecture. The architecture blueprint aims to establish foundational common and reusable platforms, and at the same time is open to agility, flexibility and innovations so that the City can respond to ever-growing demand and expectations from the City's customers in this new digital-era and other disruptive factors that drive the change.

After carefully assessing the three options proposed by KPMG regarding the City's CRM platform, staff recommends proceeding with option 3 to adopt and migrate to a new CRM platform. Staff are open to change and adjustment with a continuous improvement mindset and need to plan effectively to position the City well for the next 5-10 years. While doing so, the past effort and investment in the City's current CRM system has significant value that will be retained. The City's current CRM system will also continue to be used in daily operations during this transition and change.

Preliminary financial estimates regarding the CRM implementation are included in this report. Verified cost estimation will be completed during the discovery phase before any expenditures move forward. Staff will report back to Council with further findings.

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### **Background and Discussion:**

On January 24, Council received staff report CX-01-23 on Enterprise Web Architecture Review and its Appendix from KPMG consultants, including an "Enterprise Web Architecture & Modernization Review" final report.

On January 24, Council also approved staff report IT-01-23 for transforming design and delivery of services – evolution of information technology services (ITS) department to Burlington Digital Service (BDS).

The Ontario Ministry-funded KPMG report and engagement provided observations and options for the City to consider when continuing to evolve, enhance, and improve the organization's current architecture of multiple customer-facing technologies and applications.

The new Burlington Digital Service department includes a transformative, platform-driven approach to managing enterprise-wide technology. BDS also brings an Enterprise Architecture function to the organization that will provide leadership, guidance, and direction for the integration of customer-facing technology platforms, as well as all other aspects of this critical professional discipline.

Vision 2040: Burlington's Strategic Plan commits to "have a community where members are engaged, empowered and well-served by their City through...a customer centric approach in all City service areas" and sets a goal that "the customer experience is considered 100% of the time in the design and delivery of all services."

The 2018-2022 Burlington's Plan: from Vision to Focus established an entire focus area for projects, initiatives and work plan tasks that would achieve "Delivering customer centric services with a focus on efficiency and technology transformation," specifically through:

- Enhancing City services and delivery of citizen self-service options through technology;
- Investing in customer centric digital technologies;
- Increasing community and customer input into how City delivers services;
- Enhancing and emphasizing a customer first approach in all City service areas.

As a part of normal City operations, significant collaboration occurs regularly between Burlington Digital Service, Corporate Communications and Engagement, the Office of the City Clerk and Customer Experience to deliver on these goals. Multiple initiatives and innovative projects at the City, such as the Streamlined Development Application Fund are also advancing on these objectives and include staff from a wide range of other service areas.

The City's Customer Experience team was formally established in 2019 and oversees the daily operations of Service Burlington, the City's principal customer contact centre; knowledge base management for information about all City services; people leadership for the Councilor's Assistant group; issue and complaint resolution; City-wide education and internal consulting on all aspects of CX as a professional discipline.

The City acquired a Customer Relationship Management (CRM) system in 2018 and implemented this technology in phases for selected City services starting in March 2019. Service Burlington relies upon this technology daily to successfully operate as the City's principal contact centre, and the current CRM system includes the City's knowledge base of information about City services. The structured data from CRM

technology allows for incredibly valuable analytics and reporting that is used to track key performance indicators and share data-driven insights.

While Service Burlington receives and logs all customer requests for any City service that come through Service Burlington's multiple contact channels, only a few partner City services have been fully enabled to use CRM for responding to customer requests. Those services include:

- A. Office of the City Clerk, Committee and Legislative Services
- B. Transportation Services
- C. Burlington Transit
- D. Roads, Parks and Forestry

Animal Services is expected to be empowered with full CRM implementation and partnership with Service Burlington in June this year. All Councilor's Assistants and Mayor's Office staff have access to search and view records in the CRM system.

The City's website at burlington.ca is currently hosted by GHD, formerly eSolutions. The entire website was redesigned in 2022 with a renewed focus on plain language, simple navigation, mobile optimization, searchability (SEO), and accessibility under the AODA legislation for Information and Communications.

The KPMG report includes observations on other key customer-facing technology platforms and describes challenges including complexity, which increases maintenance and support costs; applications not integrating with other systems; and a lack of enterprise architecture, all of which are obstacles in providing a seamless customer experience.

### **Approach to Analysis of Options in the KPMG Report**

The KPMG final report provided significant observations, documentation and options to consider for ensuring that the City can optimize customer-facing technology platforms with a strong and effective architecture approach.

Following receipt of the KPMG report, a collaborative and cross-departmental team was established to consider and analyze KPMG's findings and existing strategic plans and roadmaps. This working group includes the City's Chief Digital and Information Officer, Executive Director of Community Relations and Engagement, Principal Digital Enterprise Architect, Director of Corporate Communications and Engagement, Manager Customer Experience, Manager of Creative and Digital Services, and Project Manager CRM.

Together with additional input from Procurement Services and Legal Services, this working group has now authored report BDS-04-23 to communicate the results of the analysis and recommendations that have informed the Customer Centric Digital

Architecture Blueprint that is being provided to Council for consideration and endorsement.

As shared in report CX-01-23, further staff analysis of KPMG's findings promised to consider:

1. viability and feasibility including cost, resource and vendor contract impacts;
2. a broader enterprise architecture model;
3. desired business outcomes;
4. customer and employee experience; and
5. the prioritization of separate and related initiatives occurring across the corporation.

Additional considerations added since January 10, 2023 include:

- Burlington Digital Services strategic approach;
- Establishment of the Community Relations and Engagement group, and input from the new Executive Director, CRE;
- Specific time-critical requirements related to existing vendor relationships;
- Designing and Evolving Our Organization for multiple customer-facing services (e.g., By-law Compliance).

While the KPMG report identified over 44 unique applications and platforms with some customer-facing component, the working group analysis and Customer Centric Architecture Roadmap focused on:

- The City's website at Burlington.ca;
- The need for essential utility platforms, such as a common Customer Identity and Access Management (CIAM) platform;
- The Customer Relationship Management (CRM) system;
- Consolidating multiple web form platforms to reduce the level of complexity;
- Unified integration capability among applications and systems;
- Common customer data repository;
- Data-driven analytics and enterprise business intelligence utilization.

The working group aimed to create a visual, easy to follow blueprint that illustrates all key decisions to be made, including any constraints or other dependencies for multiple work streams including:

- Creative and Digital Services;
- Customer Experience;
- Identity and Access Management;
- Online forms coordination;
- Data-driven analytics and enterprise business intelligence;

- Master data management for customer records.

### **Findings from KPMG report and City of Burlington (CoB) Perspective**

The KPMG report highlights a few observations regarding the City's current technology architecture and web service delivery:

#### 1) Missing Centralized Customer Identity

The lack of a Customer Identity and Access Management (CIAM) framework and supporting tools prevents the City's customers from authenticating with a single identity across all service channels, resulting in an inconsistent user experience for customers.

#### 2) CRM Platform Limitation

The current CRM application is built on top of Microsoft Dynamics v8.2. The proprietary application is challenging to customize and integrate with other City applications, and requires paying the vendor for professional services to support customizations or integrations. The inability to configure and customize user experience quickly and responsively as user needs change is also impacting internal employee experience.

#### 3) Customer systems sprawl and disjointed customer facing applications

The lack of proper application portfolio management may lead to disconnected customer channels and make it difficult to deliver omnichannel digital experience. Isolated portals and disjointed applications may also lead to challenges in delivering connected and consistent customer experience.

#### 4) Lack of centralized customer interactions

While Service Burlington receives a significant volume and range of customer requests each year as the City's principal contact centre, customers can also contact the City through multiple other service channels. Not all departments are currently empowered with CRM access to manage and complete customer requests. This results in delayed responses and additional work to complete requests. Requests that are managed outside of the CRM system also lack visibility for City-wide data analytics and insight generation.

#### 5) Limited visibility

Limited visibility into process status (e.g., customer and staff perspectives) leads to more inbound customer requests seeking an update on service status. If adequate details on a service request are not available in CRM, City staff without access to other systems (due to lack of system integrations or insufficient information) are forced to transfer customer calls to multiple departments, resulting in more process delays.

#### 6) Lack of system architecture integration guidelines and principles

Lack of system integration guidelines and principles may lead to an inconsistent integration pattern among CoB's various systems. This results in increased complexity and management difficulties from cost and information security perspectives.

#### 7) Underutilization of integration capabilities

Although the City has deployed several integration solutions and capabilities, these solutions are not utilized fully, nor deployed in a centralized manner to facilitate and manage all internal and external integration points among the City's main applications. Moreover, several critical applications are integrated via point-to-point integration associated with non-standardized integration pattern. This leads to greater difficulties in establishing, managing, and monitoring integration points and services as point-to-point integrations increase. In addition, frequent requests for low-end integrations (for example, iframes on the City's website) create accessibility and mobile user-experience issues.

#### 8) Lack of single customer data repository

Customer data is not stored under a single repository due to absence of data sharing technologies and strategies such as Master Data Management (MDM) and data lakes. The lack of a single customer data repository creates issues with consistency and accuracy when the City requires updated records to handle customer matters or internal requests. This also impacts the range and scope of data analytics for customer activity and preferences across the City.

#### 9) Operational prioritization

While Burlington Digital Service and other teams have the capacity to support CRM technology upgrade initiatives, this is likely at the expense of other work. The City must balance competing resource priorities and factor in additional operational support capacity that may be required to build and support customer-facing technology solutions as they continue to evolve.

#### 10) Lean IT projects staffing approach

IT staff are dedicated to delivering high-quality project results to meet the City's needs. Burlington Digital Service and other teams will address resource limitations in major projects (e.g., ERP project and burlington.ca refresh) by hiring third-party consultants and coordinating with relevant City departments to deliver the project on time and to meet business goals.

#### 11) CoB has strong capabilities to drive customer centric goals from investments in digital solutions

CoB's investments in digital solutions provide a strategic foundation for digitally enabled technology architecture. These low-code/no-code platforms have many potential add-on apps and enable automated services.

## 12) Knowledgeable staff

City staff are knowledgeable and have a vision for improvements the City can make to leverage digital technology to strengthen the City's overall services.

Further, KPMG recommended the following opportunities:

- 1) Unify the customer-facing technology layer (Web Forms);
- 2) Integration Middleware Layer;
- 3) Cross applications processes workflow integration;
- 4) Service Burlington to obtain end-to-end visibility for all customer requests;
- 5) Promote customer self-service capabilities;
- 6) Streamlined customer identity and authorization (customer portal);
- 7) Master data management strategy and governance;
- 8) Enhance data reporting and analytics.

City staff have analyzed the observations and recommendations, with the following feedback:

- Mostly aligned with the KPMG findings and recommended target architecture  
None of the findings came as a surprise. Findings are not uncommon to organizations similar to the City. The targeted web architecture is sound and the roadmap is logical.
- Recommend more focus on human-centred design, inclusive design, and customer-centric thinking  
Supporting and enabling human-centered design should be included as one key principle. All technology capabilities should aim to enable this outcome. Common CX channel and standards are good and need to be balanced with addressing unique needs from each external customer group with real world customer feedback to support the City's customer-centric direction. Suggest using outside-in approach as opposed to inside-out when architecting and designing any digital solutions.
- Recommend more focus on supporting innovation  
Technology, especially web technology, should be positioned to enable the City to experiment and deliver advancements timely and incrementally. While this is mostly enabled by how we manage projects and products, the capability of certain technology areas (e.g., users can be added and removed quickly, users can quickly configure something and try, etc.) should be considered to provide more flexible platforms to assist with business innovation activities.
- Can be bolder on API-driven approach  
The term "API" stands for Application Programming Interface. A good example of API in our daily lives is wall plugs, where the shape of these plugs are standardized,

and we can easily plug in into any outlet to get the power. Ideally, all City applications should expose modern APIs that follow open standards for ease of integration and consumption.

- More granular ‘mini’ technical service components that can be shared and reused to enable agility

Further granularity can be achieved through the introduction of “containerization” and “microservices”.

- Should establish on guidelines on when to choose low-code / no-code solutions vs. when to purchase commercial off the shelf

Low Code/No Code refers to digital platforms that can be used to build or configure solutions without actual coding skills or programming efforts. This type of digital platform is becoming more popular especially in the context of supporting business innovation and experiments. The City should establish guidelines for the service and solution delivery teams on when to use what. It’s important to highlight that these guidelines are more of guardrails as opposed to mandatory standards.

### **Alignment with the City’s Customer Centric Architecture**

With the creation of Burlington Digital Service, the City is strategically positioned to enhance and expand its services to customers through digital channels which follow user friendly customer-centric principles. There are several aspects and enabling components to the successful delivery of this new digital-era practice. When it comes to architecture, the challenge is how we can maintain a good enterprise-wide balance between reducing the complexity of the City’s digital landscape and at the same time be open to agility, flexibility, and innovation in order to respond to ever-growing demand and expectations from the City’s customers in this new digital world and other variations of disruptive factors that drive the City to change.

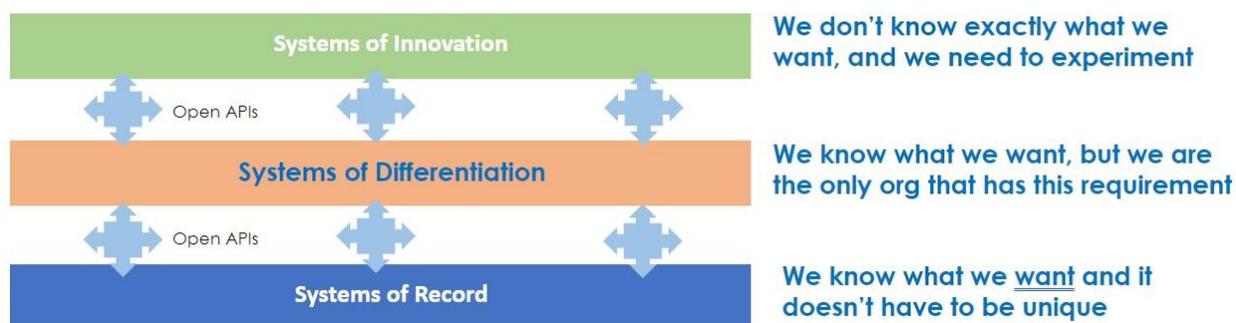
The City’s digital enterprise architecture responds to this challenge with pace-layered architecture which establishes foundational, common, and reusable platforms while supporting the unique needs and innovation demands from each business program:

- The “systems of record” layer which enables foundational business capabilities in which business leaders are happy to follow commonly accepted ways of doing things that are predictable and relatively stable, focusing on standardization and operational efficiency. Applications and products supporting these capabilities are categorized as “systems of record.”
- The “systems of differentiation” layer which supports business capabilities that enable unique processes or municipal-specific capabilities. Applications and products supporting these capabilities are categorized as “systems of differentiation.”

- The “systems of innovation” layer that enables the attributes of the business in which people think of an early-stage concept and want to experiment with a proof of concept (POC) and go through several iterations quickly. Applications and products supporting these capabilities are categorized as “systems of innovation.”

Overlaid with this pace-layered architecture, the principles of “openness” in that systems are required to be designed to avoid “monolithic”, and the functional components are required to be loosely coupled to ensure maximum flexibility. The systems are also required to follow industry standard specifications of integration (aka open APIs) so that they can talk to each other easily to share data.

The following diagram illustrates this pace-layers architecture and the “open API” concept:



The recommended target web architecture and high-level roadmap from KPMG aligns with the City's enterprise architecture. The targeted layers of web architecture fit the pace layered architecture the City is proposing. For instance, the “channels” part in the target web architecture, align with the “system of innovation” layer in the overall enterprise architecture, and some parts from the “customer-facing applications” would fit into the “systems of differentiation” layer while others would go under “systems of records”, so the way we want to evolve these applications would be different.

The centralized Customer Identity and Access Management (CIAM) platform recommended from the KPMG report resonates with the City's architecture strategy. Like a common payment gateway, a common CIAM platform will greatly enhance a consistent user experience, help the City to manage a proper level of assurance required for customers accessing varies level of information, and support improved cyber security measures.

Along with the CIAM platform, a common web form engine is also viewed as a strategic and foundational platform in the City's enterprise architecture. CIAM and web form platforms, plus common payment and notification (out-reach) platforms, would comprise the foundation of the City's customer-facing solution architecture. This would mean a

user could have a streamlined and consistent experience interacting with the digital services the City provides online, with the peace of mind that the information being exchanged is protected with the proper level of assurance. This architecture can then be coupled with core business process engines in the backend, such as a CRM platform and line-of-business specific solutions, with support from data analytic tools, forming the foundation of the City's customer centric architecture. This architecture cannot be in place without us designing each piece of the puzzle, leveraging open integration principles.

See Appendix A for details of the proposed Customer Centric Digital Architecture blueprint.

### Customer Centric Architecture Governance

Currently, there are multiple governance structures which have been established over the years.

Part of the future roadmap is to refine the governance and collaborate with Corporate Workplace Teams Initiative on the overall corporate governance framework including stakeholders, teams, and decision makers.

### **Analysis of CRM Options in the KPMG Report**

The term "CRM" refers to a computer application that enables Customer Relationship Management and customer response processes. It streamlines and automates an organization's interactions with customers and serves as the hub and backbone for customer contact management, request management, contact centre agent productivity, knowledge base management and more. CRM tools can now be used to manage customer relationships across the entire customer lifecycle, from the first point of contact to service delivery resolution. It is most beneficial when implemented organization-wide so the fullest possible range of data can be recorded and leveraged as an asset for customer requests, needs, and trends.

2023 marks five years since the start of procurement and implementation of the City's current CRM platform. Not all customer-facing services are fully onboarded, due to a mix of factors:

- Data integration complexity and technical constraints;
- Culture and change management challenges;
- Staffing considerations and changing project governance;
- Pause to complete a project restructuring in 2019;
- Resource constraints in CX and partner services.

The City needs to make a timely decision on the current CRM solution due to the following factors:

- 1) The City's customer-facing services, especially its digital service delivery channels, need to evolve so that the City can respond to ever-growing demand and expectations from the City's customers for modern and effective digital services. As demonstrated with the Web Modernization project, technology needs to be constantly reviewed and refreshed to optimize the customer experience.
- 2) It has been five years since the launch of the current CRM platform. In today's digital world, five years can represent a generation of technology and is a typical term when a technology assessment needs to be conducted.
- 3) The City is embracing a continuous improvement mindset and openness to change, evolution and adjustment for the best possible results. Burlington Digital Service, Corporate Communications and Engagement and Customer Experience are taking a proactive approach to future challenges we foresee in the next 5-10 years and want to plan effectively now so the City is positioned well to deliver outstanding customer experiences with technology that will help us innovate and continue to grow.

To evolve the CRM platform to the next maturity level, three options were provided by KPMG:

- Option 1: Product upgrade

This option includes upgrading the current CRM baseline platform (Microsoft Dynamics) from v8.3 to v9. It also explores the possibility of changing the hosting model from vendor hosting to be hosted in Microsoft Azure cloud, either by the City or by Microsoft.

- Option 2: Upgrade and re-architect

This option takes us one step further: besides all the actions from option 1, KPMG recommended re-architecting the existing CRM platform which includes the following steps:

- Decoupling web front end for public facing capabilities;
- Leveraging features of underlying platform to enhance CRM capabilities;
- Containing the CRM to core functionality and leveraging integration and interoperability to extend CRM functionality;
- Implementing Customer Identity and Access Management (CIAM) platform;
- Externalize data layer to provide seamless integration with other platforms.

- Option 3: Evolve to a new CRM platform

This option is to take the CRM service to the next level by adopting and migrating to a new CRM platform. There are a few CRM platforms available on the market for the City to choose from.

Staff have reviewed the options, and are recommending proceeding with option 3, for the following reasons:

- While option 1 is least disruptive, it is not able to address many of the functional gaps identified from the current version. This option is also not aligned with the recommended future web architecture or business outcomes, hence would lead to limited flexibility for supporting human-centered design and streamlined service delivery.
- For option 2, if all steps can be completed, it would lead to a renewed customer experience and address functionality gaps. However, significant effort and cost is required, and the likelihood to complete all steps is low. This option is costly, has a high risk requiring indefinite timelines, and will foundationally change the product the current vendor is offering which will lead to a “deeply customized” product. This will in turn incur much higher support costs than what we are paying today.
- Option 3 is best aligned with the City’s long-term goals. Past investments in CRM have been valuable, and the current CRM is functional. It is important to note that past effort and investment in the City’s current CRM system has significant value that will be retained. Every successive CRM implementation has delivered business process evaluation, redesign, and knowledge base growth that will be repurposed in any future CRM deployment.

We recommend the City proceed with option 3 and evolve to a new CRM platform, with the following high-level roadmap.

City-wide implementation of a new CRM platform is expected to be completed within 42 months from the start date. A timely implementation is dependent on a few factors:

- Accelerated procurement and contract negotiations;
- Resource availability in the impacted departments and resource allocation to Service Burlington to accommodate all departments;
- The establishment of some key enabling digital platforms such as the centralized Customer Identity and Access Management (CIAM) platform, and a new enterprise application integration platform (aka, enterprise service bus);
- A new enterprise data analytics platform;
- Clear and realistic scope;
- Budget alignment.

Within the first 24 months, there will be two streams proceeding in parallel:

- From a tactical standpoint, staff will complete the current CRM implementation for Animal Services, as the design and planning have already been completed. However, any further rollouts will be deferred. The contract with the current vendor will expire in July 2023. The contract allows 5 one-year renewals. Staff will renew the contract for one year with the anticipation that the contract will likely be renewed again for additional years as required. This will align with the duration of a new CRM platform rollout to ensure a smooth transition and maintain vendor support for the current CRM platform.
- From a strategic standpoint, staff will complete the market scan, explore procurement options and confirm funding and FTE requirements to be included in the 2024 budget cycle. Initial assessment is implementation of a new CRM platform and migration of existing users will occur within 24 months.

For months 24 to 42, the project will complete the rollout to the rest of the City departments. Staff are recommending a City-wide rollout as opposed to a phased approach, to minimize system integration and data synchronization complexity. The only exception to this may be a first phase that implements new CRM technology for services that are fully using this system as of the start date, and then implement the new technology for services that have never been fully empowered to use CRM before.

It is important to note that existing data and user information will be retained with and migrated into any new CRM platform. A new CRM system for the City will not be required to start from scratch. Historical customer contact and request data, and the City's existing knowledge base of over 250 articles, will be retained and repurposed in the new system.

The high-level CRM implementation roadmap is illustrated below. Roadmap will be confirmed as part of the detailed planning process outlined in the next steps.



### Other Considerations / Impacts of Option 3

Replacement of the current CRM system will require re-pointing and potentially rebuilding the existing business view of CRM data from RockSolid Technologies and WebFOCUS, the City’s Business Intelligence platform, to draw on a new CRM system and a new City-wide platform for BI.

The CX team is one of the City’s most frequent and avid users of business intelligence, and relies on this platform to provide dynamic, data-driven dashboards with connected business views of data from CRM and the City’s phone system (Mitel). This functionality and access to enterprise BI needs to continue. Historical data from the existing CRM system would need to be captured and available for use with new CRM data as well.

CX also coordinates online forms creation at the City today, as the result of recommendations in the August 2020 Online Forms Review. The current CRM system is considered one of the City’s three main form building tools, together with Form Builder from GHD (formerly eSolutions) and SmartGuide from AMANDA. The Customer Centric Architecture Blueprint needs to include consideration of enterprise business intelligence use and online forms coordination.

### **Financial Matters:**

#### **Total Financial Impact**

##### Customer Centric Digital Architecture Blueprint

Preliminary cost estimation for the implementation of the entire Customer Centric Digital Architecture Blueprint is projected at \$5-8M in total for the duration of 3-4 years. Verified cost for the key platforms identified on the Customer Centric Digital Architecture Blueprint will be provided as part of the next steps.

### New CRM Platform

Preliminary cost estimation of the new CRM platform implementation is below:

- CRM implementation including licensing and external labour is between \$1.9M and \$3.35M
- Internal resource cost is projected as \$1.8M
- Total CRM implementation cost is estimated between \$3.7M and \$5.2M
- Ongoing CRM licensing cost is projected at \$200K to \$250K annually.
- Ongoing operating costs including FTE requirement are not yet defined.

Presently, the total spending on the existing CRM tool implementation and operation is \$736K. This number does not include internal resource costs including full-time and contract positions.

There will be an estimated \$1.2M remaining, at the end of 2023, in CA0059 CRM capital order (original implementation).

Verified cost estimation will be completed during the discovery phase.

### **Source of Funding**

#### Customer Centric Digital Architecture Blueprint

Digital transformation funding in the amount of \$750,000 has been included in the 2023 Capital Budget. A portion of this funding will assist in executing the Customer Centric Digital Architecture Blueprint. Any additional funding required will be identified in future budget cycles.

#### New CRM Solution

Existing CRM capital order and a new funding request will be made for the 2024 fiscal year once discovery phase is completed in 2023.

### **Other Resource Impacts**

Staff will examine FTE and cost requirements and provide more detail on any anticipated resource needs for both CRM implementation and the ongoing operation.

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### **Climate Implications**

Not applicable.

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## **Engagement Matters:**

Customer feedback was reviewed during the creation of this report, through survey submissions and user interviews.

- internal engagement from CRM users (City employees) included in a survey conducted by KPMG
- external customer feedback relayed to CX staff through members of Council and the Mayor; customer focus groups specific to aspects of CRM (web portal and email text) will be facilitated by CX and Public Engagement in 2023.
  - Next steps in this effort will require Communications, Engagement, and Change Management plans. Following discussion, recommendations, and directions from Council, key messages need to be developed and shared with City staff. The following groups will be key stakeholders in change management, internal communications and customer engagement:
  - CRM User Community
  - CX Working Group
  - Corporate Communications and Engagement
  - Fully enabled (live) CRM departments: Office of the City Clerk, Transportation Services, Burlington Transit, Roads Parks and Forestry
  - Burlington Leadership Team
  - External customers

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## **Conclusion:**

The KPMG Enterprise Web Architecture Review provided several options for the City to consider for enhancing and modernizing the current customer-facing technology applications and platforms.

A collaborative, cross-departmental group of City staff from Communications and Engagement, Customer Experience, Burlington Digital Service, Legal and Procurement Services completed the analysis contained in this report and provided the proposed Customer Centric Architecture Blueprint and the new CRM implementation roadmap for Council's consideration.

### **What we have determined to date with certainty**

#### Overall Customer Centric Digital Architecture

- Creation of Burlington Digital Services;
- Established Enterprise Architecture practice in the organization;

- Development of a Customer Centric Digital Architecture following a transformative, platform-driven blueprint to managing enterprise-wide technology.

CRM Specific:

- Animal Services go-live June 5 in current CRM system;
- No further implementations with current CRM system;
- No upgrade to Version 9 of current Microsoft Dynamics CRM system;
- Renew the current contract with Rock Solid Technologies for one year, in accordance with original contract terms (July 18 renewal date), subject to mutual agreement with the vendor;
- Current CRM technology is not meeting needs and product roadmap is not responsive to critical business requirements going forward;
- Current CRM technology is five years old in 2023 and technology assessments are standard during this time;
- Pursue Option 3 (i.e., evolve to a new CRM platform) provided by KPMG Web Architecture and CRM report;
- When a new CRM system is implemented, the preferred approach is to onboard all customer-facing City services at the same time (no further phased implementations; CRM for all).

**Work and Analysis Currently in Progress / Conclusions Still to be Determined**

- Digital Business Strategy now underway;
- Fusion Team is being defined for the provision of external customer-facing technology solutions and digital services;
- Procurement strategy for new CRM technology;
- Platform selection for future CRM system, if preferred;
- Resource requirements for each work stream in the Blueprint.

**Next Steps**

- Staff will develop a roadmap for the implementation of the Customer Centric Digital Architecture blueprint, including costs for the key platforms identified on the Customer Centric Digital Architecture Blueprint;
- Staff will examine and validate the FTE and cost requirements for the new CRM platform implementation and operations;
- Staff will select a procurement approach for the new CRM software and the implementation partner;
- Staff will start the detailed CRM implementation planning to inform 2024 budget request.

Staff will report back to Council in Q3 2023 regarding the progress made on the above activities.

Staff look forward to questions, discussion, and next steps as the City's Customer Centric Architecture continues to evolve and mature to continue to provide the best possible customer experience.

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Respectfully submitted,

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## **Appendices:**

- A. Customer Centric Digital Architecture Blueprint

## **Report Approval:**

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.