



Llywodraeth Cymru
Welsh Government

Parc Cathays/Cathays Park
Caerdydd/Cardiff
CF10 3NQ

18 August 2023

Dear ,

ATISN 18755 – CRM Software

Information requested

Thank you for your request which I received on 21st July 2023. The information you have requested can be found at Annex A.

Our response

Please see our response at Annex B.

Next steps

If you are dissatisfied with the Welsh Government's handling of your request, you can ask for an internal review within 40 working days of the date of this response. Requests for an internal review should be addressed to the Welsh Government's Freedom of Information Officer at:

Information Rights Unit,
Welsh Government,
Cathays Park,
Cardiff,
CF10 3NQ

or Email: Freedom.ofinformation@gov.wales

Please remember to quote the ATISN reference number above.

You also have the right to complain to the Information Commissioner. The Information Commissioner can be contacted at:

Information Commissioner's Office,
Wycliffe House,
Water Lane,
Wilmslow,
Cheshire,
SK9 5AF.

However, please note that the Commissioner will not normally investigate a complaint until it has been through our own internal review process.

Yours sincerely

Annex A

1. Does your organisation use Customer Relationship Management (CRM) software? (Example: HubSpot, Salesforce, Dynamics, Other, etc.)
 - Yes
 - No
2. If yes, please specify which CRM(s) are used by your organisation:
 - HubSpot
 - Salesforce
 - Dynamics
 - Other (Please specify)
3. What license level/subscription does your organisation have?
4. What is the annual cost of your CRM system(s)?
5. List any job roles by (job title) within your organisation that communicate with contacts via the CRM(s) system?
6. Does your organisation work with any external agencies to manage the CRM?
7. Does your CRM integrate with other systems within your organisation? (Example: finance systems, Other CRM Systems, etc.)
 - Yes
 - No
8. If yes, please specify which other systems your CRM(s) are integrated with:

Annex B

1. Does your organisation use Customer Relationship Management (CRM) software? (Example: HubSpot, Salesforce, Dynamics, Other, etc.)

Answer: Yes

2. If yes, please specify which CRM(s) are used by your organisation:

Answer: Dynamics

3. What license level/subscription does your organisation have?

Answer: Negotiated Enterprise Agreement (NEAP) for Dynamics CRM 2016 v8.2
- Unlimited Users

4. What is the annual cost of your CRM system(s)?

Answer: Perpetual License n/a, no annual software maintenance charge

5. List any job roles by (job title) within your organisation that communicate with contacts via the CRM(s) system?

Answer: Team Managers, Support Team(s) and Inspectors.

6. Does your organisation work with any external agencies to manage the CRM?

Answer: No

7. Does your CRM integrate with other systems within your organisation? (Example: finance systems, Other CRM Systems, etc.)

Answer: Yes

8. If yes, please specify which other systems your CRM(s) are integrated with:

Answer: SAP, EDMS (Objective) GovNotify, Direct Messaging, Microsoft Azure and PowerBI.