



REPORT FOR ACTION WITH CONFIDENTIAL ATTACHMENT

Digital Transformation—Customer Relationship Management

Date: February 26, 2021

To: Digital Transformation Committee and the Board of Directors of TO Live

From: President & CEO

REASON FOR CONFIDENTIAL INFORMATION

Attachments to this report contain positions, plans, procedures, criteria, or instructions to be applied to any negotiations carried on or to be carried on by or on behalf of the City or local board.

SUMMARY

This report is to provide the Board with an update on the status of TO Live's Digital Transformation project regarding Customer Relationship Management.

RECOMMENDATIONS

The President & CEO recommends that the Board of Directors of TO Live:

1. Approve the Customer Relationship Management solution as part of the overall Digital Transformation project, as noted in Confidential Attachment 1
2. Direct that Confidential Attachment 1 remain confidential in its entirety, as it contains positions, plans, procedures, criteria, or instructions to be applied to any negotiations carried on or to be carried on by or on behalf of the City or local board.

FINANCIAL IMPACT

There is no financial impact to the approved project budget.

DECISION HISTORY

At its January 29, 2021 meeting, the Board directed that the President and CEO, TO Live suspend entering into any Customer Relationship Management (CRM) agreement other than Tradable Bits, and that any additional CRM purchase must be brought to the Digital Transformation Committee with a justification on needs, Return on Investment (ROI), integration work and costs.

<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2021.CT20.6>

COMMENTS

At its January 29, 2021 meeting, the Board directed that the President and CEO, TO Live suspend entering into any Customer Relationship Management (CRM) agreement other than Tradable Bits, and that any additional CRM purchase must be brought to the Digital Transformation Committee with a justification on needs, Return on Investment (ROI), integration work and costs.

This report provides an update on the status of the Customer Relationship Management (CRM) platform of TO Live's Digital Transformation project.

The internal staff Digital Transformation Selection Committee has conducted an extensive CRM review process and selected a preferred platform. The selected platform will deliver on TO Live's Digital Transformation roadmap and will address its strategic and business challenges (see Confidential Attachment 1).

Based on the foregoing, Management seeks Board approval to include this CRM solution into the overall project scope.

CONTACT

Michael Pietrocarlo
Director of Marketing
T: 416-368-6161 x7185
Michael.Pietrocarlo@tolive.com

David McCracken
Director of Information Technology
T: 416-368-6161 x7132
David.McCracken@tolive.com

SIGNATURE

Clyde Wagner
President & CEO

ATTACHMENTS

Confidential Attachment 1– Digital Transformation Customer Relationship Management