

10th August 2023

CITB
Head Office
Sand Martin House
Bittern Way
Peterborough
PE2 8TY

Email: information.governance@citb.co.uk
www.citb.co.uk

Dear [REDACTED]

Freedom of Information Request: 112023

Following your email dated 21st July 2023 requesting the following:

I am writing to you under the Freedom of Information Act 2000 to request the following information:

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:

The response is as follows.

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

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

Microsoft Dynamics 365
3. What license level/subscription does your organisation have?

CITB provisions licenses through an Enterprise agreement and a cloud services provider.

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

Circa £105K

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

The following Job titles have email capability direct from our CRM system:

Engagement Officer

Apprenticeship Officer

However there are additional roles which use details taken from the CRM system to communicate with our customers.

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

Yes

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

Yes

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

Finance and Payment Systems

If you are unhappy with this response, or you wish to complain about any aspect of the handling of your request, then you should contact me in the first instance. If informal resolution is not possible and you are still dissatisfied, then you may apply for an independent internal review by contacting Adrian Beckingham, Strategy and Policy Director, CITB, Sand Martin House, Bittern Way, Peterborough, PB2 8TY or email adrian.beckingham@citb.co.uk.

If you remain unhappy following an internal review, you may take your complaint to the Information Commissioner under the provisions of Section 50 of the Freedom of Information Act. You can raise a complaint with the ICO via their portal www.ico.org.uk/foicomplaints or by contacting them at

Information Commissioner's Office

Wycliffe House

Water Lane,

Wilmslow, Cheshire,

SK9 5AF

Tel: 0303 123 1113 (local rate)

Further details of the role and powers of the Information Commissioner can be found on the Commissioners website: <https://ico.org.uk/>

Yours sincerely

Jonathan Francis

Information Risk & Data Governance Manager