



[REDACTED]

11 August 2023

Dear [REDACTED]

Freedom of Information request: FOI2023/00560

Thank you for your Freedom of Information request received on the 21 July in which you requested the following:

Your request:

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:

Our response:

I can confirm that UK Research and Innovation (UKRI) holds some information relevant to your request. Please see the information below.

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

Yes.

Please note that there are two parts of UKRI that use Salesforce for independent uses and have separate license agreements. These are Digital Data and Technology (DDaT) who provide a cross-UKRI service and Innovate UK. Therefore, there are two submissions for questions as appropriate.

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

- Salesforce Sales Cloud and Service Cloud

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

DDaT:

Licence Level/subscription:	From	To
Sales Cloud - Enterprise edition x 600	24/12/2022	23/12/2023
Salesforce Knowledge x 1	24/12/2022	23/12/2023
Sales Cloud Enterprise Edition x 15	24/12/2022	23/12/2023
Sandbox 1 of 2	24/12/2022	23/12/2023
Sandbox 2 of 2	24/12/2022	23/12/2023

Innovate UK:

Licence Level/subscription:	From	To
Salesforce: Licensing - Advisory (Salesforce Edge Project - Sales Cloud)	21/05/2021	20/05/2022
Salesforce: EEN Extension	28/10/2021	27/10/2022
Salesforce: Licence & Licence contingency	11/01/2021	31/10/2022
Salesforce: Standard Renewal (Main Licence) + Service Cloud + Mulesoft + Marketing Cloud	01/11/2022	31/10/2023
Salesforce: x20 Additional Licences	23/07/2023	31/10/2023

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

DDaT:

Licence Level/subscription:	Amount (Excl VAT)
Sales Cloud - Enterprise edition x 600 (unit cost £530.52 per annum)	£318,312.00
Salesforce Knowledge x 1 (unit cost £317.52 per annum)	£317.52
Sales Cloud Enterprise Edition x 15 (unit cost £632.52 per annum)	£9,487.80
Sandbox 1 of 2 (unit cost £63,504.00 per annum)	£63,504.00
Sandbox 2 of 2 (unit cost £95,494.68 per annum)	£95,494.68
Total	£487,116.00

Innovate UK:

Licence Level/subscription:	Amount (Excl VAT)
Salesforce: Licensing - Advisory (Salesforce Edge Project - Sales Cloud)	£106,165.56
Salesforce: EEN Extension	£166,836.76

Salesforce: Licence & Licence contingency	£746,550.19
Salesforce: Standard Renewal (Main Licence) + Service Cloud + Mulesoft + Marketing Cloud	£981,733.82
Salesforce: x20 Additional Licences	£4,481.00
Total	£2,005,767.33

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

There are a variety of job roles that communicate with contacts via the CRM system. We are exempting the relevant job titles under section 40(2) of the FOIA. Disclosing this information would contravene the first Data Protection Principle as defined under Section 86 of the Data Protection Act 2018 and Article 5 of EU General Data Protection Regulation (GDPR) 2016. Section 40(2) is an absolute exemption and does not require a public interest test.

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

DDaT: No

Innovate UK: No.

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:

DDaT: It is intended that the CRM will be the master repository of contact and organisation data for UKRI. It will therefore interface with UKRI's Finance and Grant management systems.

Innovate UK: The Salesforce CRM is part of the Funding Platform architecture. The Salesforce CRM is integrated with Innovate UK's Funding Service used by external applicants. It is also integrated with the Data Platform (Data Warehouse) and an Integration Platform via Application Programming Interface (APIs).

If you have any queries regarding our response or you are unhappy with the outcome of your request and wish to seek an internal review of the decision, please contact within the next 40 working days:

Head of Information Governance

Email: foi@ukri.org

Please quote the reference number above in any future communications.

If you are still not content with the outcome of the internal review, you may apply to refer the matter to the Information Commissioner for a decision. Generally, the ICO cannot make a decision unless you have exhausted the review procedure provided by UKRI. The Information Commissioner can be contacted at: www.ico.org.uk.

If you wish to raise a complaint regarding the service you have received or the conduct of any UKRI staff in relation to your request, please see UKRI's complaints policy: <https://www.ukri.org/about-us/policies-and-standards/complaints-policy/>

Yours sincerely,


Information Governance

Information Rights Team

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www.ukri.org