

ECSA: Systems Renovation

Status Report

May 2025

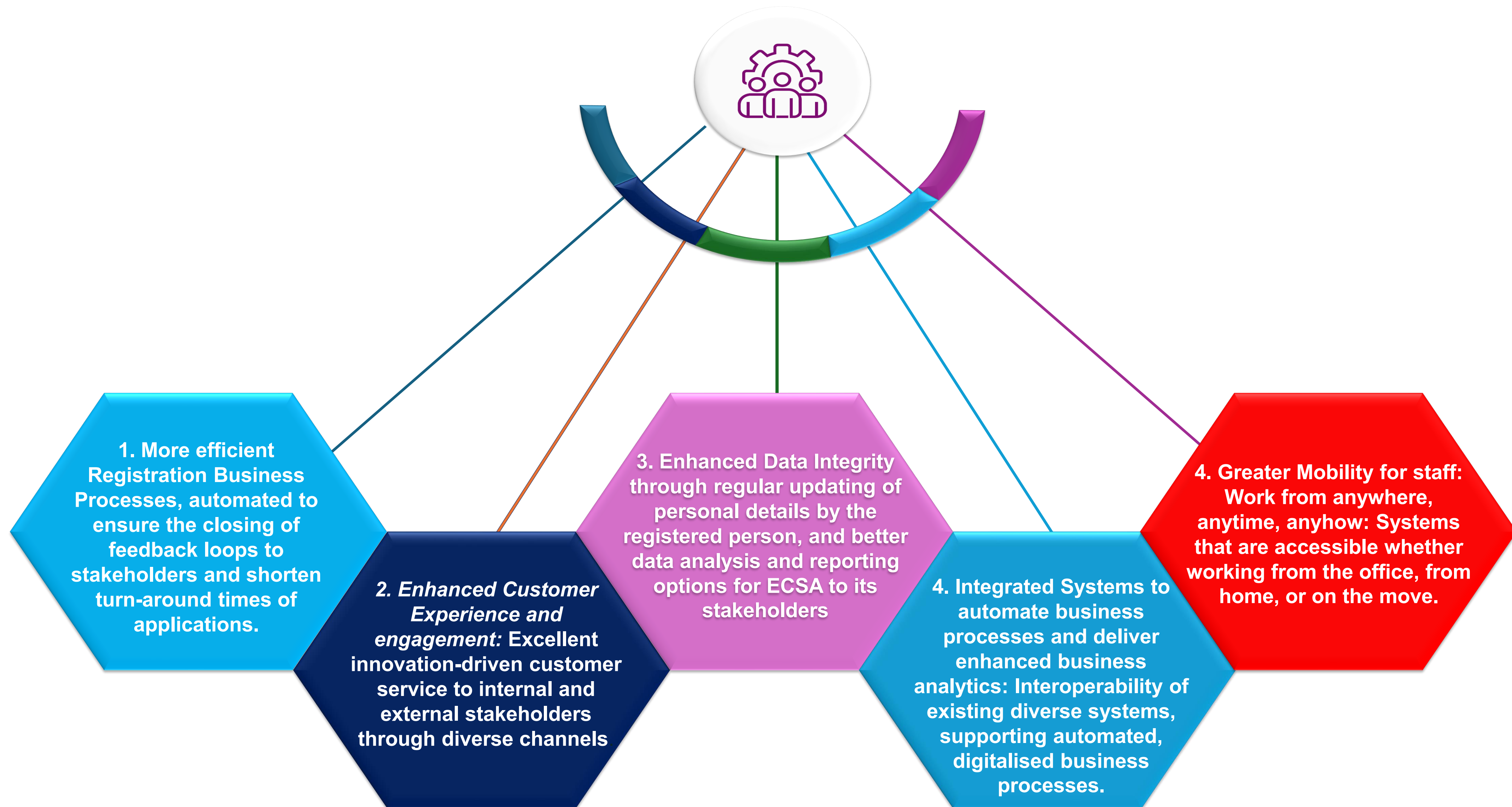
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Phase 1

CRM Renovation Project Objectives



ICT LOWLIGHTS & HIGHLIGHTS

- CRM Renovation project implementation commenced before the BPR project, leading to delays in designing blueprints
- Resignation of key resources from Altron
- Time taken to resolve the SAGE integration challenge



- ICT Strategy and Corporate Governance of ICT Charter reviewed
- Website Development almost Complete,
- Portal Improved to cater for Professionals,
- Cyber Security Training run monthly,
- PrivySeal Certification Process almost complete and data cleansing as a bi-product,
- Development of key processes completed
- CRM Renovation Project Phase one – 1 March 2025
- Phase 2 – May 2025.
- Data Retention and Archiving Plan developed

Other Developments in Progress

ECSA has also developed with its renovation partner:

1

A CPD portal with automated functionalities to address current concerns with CPD compliance uploads.

2

New payment gateways for safe real-time payments of application and annual fees.

Reduction of the suspense account.

3

Automated processes for accreditation documentation from HEIs.

4

A virtual chatbot that can respond to general queries in real-time.

Portal access and Data integrity

- *The Registration Portal is a platform that Professional and Candidates can access to
 - *apply for registration purposes in one of the Council-approved Categories and/or*
 - *update personal information as it changes and at the time of it changing.**
- *The Portal is all about ease of access and use.*

For applicants:

The portal will allow applicants to complete all required fields and add all evidences against the competencies for registration purposes.

Drawings/ designs and the like, will be uploaded directly to the portal.

ECSA will communicate timeframes for updating of personal and contact details soon

For those already registered:

ECSA will REQUIRE that all registered persons access their profiles through the portal either through redeeming an existing password or creating a profile.

After accessing the profile, every registered person MUST update their personal information. Personal profile information will feed the information displayed in a redacted format on the digital registration certificate. Erroneous contact and personal details on a profile will translate as such to the certificate and will be to the cost of the registered person to correct.

MVP Phase 1 Scope

Sage Integration to enable Annual Billing

Invoice Creation
Customer synchronization
Payment gateway

Finance

Price List Management
Billing Run Processes
Invoice Management in Portal
Off-System Payment Handling
Apply for Concession

Integration

PaperTrail, Sage, Payment Gateway

Registration

CPD

Environment

Environment clean up
Provision of DEV, UAT, Pre-Prod, VM and Production

Data Cleansing Phase 1

Data Cleansing (Member Entity)

MVP Phase 2 Scope

Rest of SAGE integration functionality
Invoice (payment) status updates back to CRM
Bulk employer invoicing

Finance
Vet Concession Request
Apply for Reinstatement
Process Reinstatement
Apply for Reinstatement Status
Vet Retirement Application

Legal

QMP

Identity Management

CPD
New functionality

Education

Rest of the integration

Data Cleansing Phase 2
Data Cleansing (rest of entity)

Date of Report:	23 June 2025			Project Title:	CRM Systems Renovation						
Project Start Date:	Aug 2023			Project Managers:	Therry Martins - ECSA ADB Mariska Griffiths						
Project End:	July 2025			Project Sponsor:	Dr Bridget Ssamula ADB Raezaan Hattingh						
Actual % Complete:	80%	Overall RAG Status	R	Schedule:	R	Budget	A	Scope:	M	Risk:	R

1 Deployment & Stabilisation
Go-live achieved: 26 April 2025 (cut-over completed 28 March; two-week PGLS ended 8 May).
Modules live: Registration, CPD and Finance – core transactions functioning in production.
- Defect resolution: ≈ 396 defects logged during UAT/PGLS (Post Go-Live Support) - Fixed (status = “Fixed”): 282 (71.2 %) - Duplicates: 12 (3.0 %) - Deferred (status = “MVP 2”): 20 (5.1 %) - Ready for Customer Testing: 8 (2.0 %) - Under Investigation: 2 (0.5 %) - No status assigned (blank): 72 (18.2 %) Key takeaways for the status report: - Over 70 % of all logged defects have now been accepted as fixed by the business. 5 % of items were identified as out-of-scope change requests (MVP 2) and will be handled via CR process. 18 % of defects still lack any status classification—this indicates a backlog in triage or assignment.
Data readiness: Registered-Practitioner quality dropped from 96 % to 88 % due to the increase in duplicated caused by registrations on the Portal
Annual billing: Altron provided a Root Cause Analysis (RCA) report into the issues escalated by the CFO, reworked all CRM processes and generated a new annual bill. Finance has completed their recon and the generation of the remaining invoices will be completed by 24/06.
Change-management assets: Marketing team has built Knowledge-Centre content including training material and videos to help Portal users navigate the new functionality.
Remaining scope for CPD, Registration and Finance will be implemented in phase 2.

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- Phase 1 of the CRM Renovation went live on 26 April 2025, bringing the new Registration, CPD and Finance modules into daily production. Most of the teething problems surfaced during the two-week post-go-live support window were closed quickly.
 - Behind these positive indicators, however, a number of operational and data challenges require urgent attention. Practitioners continue to log queries related to invoice issues, outdated website data, etc, most of which can be attributed to poor data quality and the challenges experienced with generating annual billing invoices mainly related to the Altron escalation and RCA.
 - Generation of annual billing invoices was kick started last week and should be completed by 24 June 2025.
 - Data integrity is emerging as a second pressure point. Because the legacy SalesHub app is still in use, conflicting processes and portal sign-up gaps have pushed overall data quality down to 88 percent. EMCO’s commitment to retire the old app by 31 July is therefore critical to stabilising the information architecture.
 - Finally, Altron Digital Business has proposed a three-week extension to post-go-live support and a twelve-month managed-services retainer valued at R 1.86 million. The programme team believes a short, capped “burn-down” contract, combined with a strengthened internal ServiceDesk, will contain cost exposure while preserving momentum for Phase 2. In summary, Phase 1 is functionally live and broadly on schedule, but its quality and budget outlook will remain amber until the billing backlog, data divergence and support-model decisions are resolved.
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Phase 2

Date of Report:	20 May 2025			Project Title:	CRM Systems Renovation						
Project Start Date:	Aug 2023			Project Managers:	Therry Martins - ECSA ADB Mariska Griffiths						
Project End:	July 2025			Project Sponsor:	Dr Bridget Ssamula ADB Raezaan Hattingh						
Actual % Complete:	80%	Overall RAG Status	M	Schedule:	R	Budget	A	Scope:	R	Risk:	R

1 Scope & Progress
Scope composition. Phase 2 carries the remaining (“deferred”) Finance, CPD and Registration items that were descoped from Phase 1, plus new work packages for Education, Legal and Quality Management Programmes (QMP). Core-feature build cadence. The majority of functional stories were coded earlier in the calendar year; Altron Digital Business (ADB) is applying incremental tweaks after each playback and re-presenting the changes before user-acceptance testing (UAT) commences. Integration bottleneck – Firtech. Firtech, the ADB sub-contractor responsible for Twilio, WhatsApp and website-chatbot integrations and other integrations, has slowed delivery since Change Request 17 (Robotic Process Automation) was cancelled and related payments were withheld. Should Firtech withdraw, all external-messaging functionality will stall and a replacement partner will be required. Resource tension & planning gap. All active streams—Finance, CPD, Registration, Education, Legal and QMP—are progressing, yet Programme Management is still awaiting ADB’s refreshed project plan with firm milestone dates. Capacity risk persists because only three ADB developers are shared across Phase 1 defect fixes and the entire Phase 2 build. ADB has however onboarded two new team members (Defect Remediation & QA). Outstanding design sign-offs. The lower-level designs (including Improper Conduct) remain partially signed; which could lead to re-work and UAT slippage if these are not resolved quickly .

- Phase 2 of the CRM Renovation has formally kicked off, carrying forward the deferred Finance, CPD and Registration items and broadening the mandate to include Education, Legal, QMP, Identity Management and the “rest” of the integration backlog. Core Finance features (Vet Concession, Reinstatement and Retirement) are already in build, and Altron is running iterative playbacks before user-acceptance testing.
- MVP 2 is in progress and CPD & Registration deferred work – targeted completion 30 June, and completion of MVP 1 defect backlog being remediated in parallel.
- Progress remains fragile. The Sage Integration API has not been implemented, and Firtech—responsible for Twilio, WhatsApp and chatbot work—has slowed delivery after the cancellation of Change Request 17, raising the risk that external-messaging integrations will miss the Phase 2 window. Altron’s has highlighted that its three-developer team is stretched across multiple streams, echoing Phase 1 capacity concerns. Until design sign-offs are secured, an updated resource-loaded schedule is issued, and the Firtech commercial impasse is resolved, Phase 2 must be rated **amber** for schedule and budget, **and red-watch** for critical integrations.

3 Phase 1 RAID Summary (live items only)				
Ref	Type	Description	Impact if Unmanaged	Mitigation / Next Step
R-2-2	Risk	Firtech integration at risk. Payment dispute after cancellation of CR17 (RPA) has caused Firtech to slow Twilio, WhatsApp and chatbot deliverables.	External-messaging capability may slip out of Phase 2, forcing scope reduction or new vendor onboarding.	Align new SoW by 31 May or activate plan B.
R-2-2	Risk	Sage Integration API partially implemented but costs not yet approved	Payment processing and reconciliation testing cannot start; Phase 2 acceptance criteria jeopardised.	Decision on build-vs-reuse by 31 May.
R-2-4	Risk	Developer capacity overstretched. Only three ADB developers are split between Phase 1 defect fixes and six Phase 2 streams.	Schedule slip and cost creep; quality degradation.	Establish dedicated “defect squad” for Phase 1; freeze enhancement requests until backlog < 10 open items; require ADB to table an updated resourcing plan with milestone dates by 31 May.

Budget

#	CHANGE REQUESTS	Date raised	Raised by	Status	Amount	Comment
CR 1	Replace Orlo with Twilio (CR01)	2023/12/11	Tumelo Kekana	Approved	R -	
CR09	CR09 - PaperTrail's TinyURL	2024/04/03	Nosintu	Approved	R -	
CR11	CR11 - Project Timeline Extension	2024/05/06	Tumelo Kekana	Approved	R1,764,115.46	
CR14	CR14 -React App - File Upload And Index Document API Call and List Of File Change API Change	2024/08/13	Fanie Botha	Approved	R 168 350.40	
CR15	CR15 - Document Upload Feature for SHEQSys in PVA	2024/08/13	Fanie Botha	Approved	R 145 903.68	
CR16	CR16-Update of PVA FAQ Responses and Document Re-upload	2024/08/13	Fanie Botha	Approved	R 86 981.04	
CR17	CR17 - 15102024 ECSA RPA Based Integration with Sage	2024/09/12	Gareth Salvage	Cancelled	R 1 103 126.00	This has been cancelled and awarded to HealXR
CR 18	CR18 Privyseal integration			Approved	R 47 000.00	
CR19	Data Cleansing			Rejected	R 1 066 434.00	
CR20	Identity Management			Approved	R 22 447.49	No requisition/PO available
CR21	Environments			Approved	R 108 000.00	No requisition/PO available
CR1a	CRM Twilio PVA Environment Establishment and Provisioning			Open	R 130 958.15	Pending approval
	Total CRs				R 2 792 219.72	

Data Analytics					R 3 572 547,68
Total CRs					R3 315 476.00
variance					R257 071.68
HealXR CRs					
Total CR17 amount				R	1 103 126.00
Software Developer				R	547 000.00
Sage Integration				R	134 305.00
CRs Total				R	681 305.00
Variance					R421 821.00



THANK
YOU