

City Council – Action Request Form

Date: October 15, 2018

To: The City Manager

From: Thomas Kureczka, Chief Information Officer

Council Action Requested:

Resolution Approving a Contract with Rock Solid Technology, Inc. for a New Customer Relationship Management System

Strategic Focus Area: Service Excellence

Strategic Objective: Ensure Service Delivery Efficiency and Effectiveness

Strategic Plan Action Item: No

Key Work Item: Yes



Summary of Information:

Replacing the City’s current Customer Relationship Management (CRM) system is an Information Systems FY18-19 Key Work Item. The current system was implemented in 2004 in the initial days of the call center services provided by City Link staff. Early on, staff upgraded the system with vendor updates, but for the past several years, vendor-provided updates have been very limited resulting in critical system limitations.

The current system has some spatial features and interfaces with the City’s Geographical Information System (GIS), but these functions are limited and not maintained at the pace of the technology updates applied to the GIS platform. The current system offers some reporting and integration capabilities with the City’s back-end work order management systems, but these capabilities are very limited.

Staff wrote a Request for Proposal (RFP) for a new solution based on the business needs of City Link staff and other departments and operations. Staff received 11 vendor responses, and using the review and selection criteria defined in the RFP, an evaluation panel of City staff narrowed the list down to five finalists. Three of these vendors have offices in North Carolina, none in Forsyth County. Staff has completed on-site demonstrations with all five finalists. Exhibit B provides the combined scores of the evaluation panel for the each finalist.

Committee Action:

Committee	<u>Finance 10/8/18</u>	Action	<u>Approval</u>
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For	<u>Unanimous</u>	Against	<u></u>
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Remarks:

Staff recommends Rock Solid Technology, Inc. (Rock Solid) as the preferred vendor for meeting the City’s needs. Rock Solid has an office in Raleigh, and its proposal includes sub-contracting with a local and long-time established M/WBE, Key Services, for 10% of the total contract to perform project management and implementation services. The hosted Rock Solid services include user subscriptions and on-going staff training, upgrades, and maintenance support.

Implementation of the Rock Solid solution will include business process analysis and mapping of the entire sequence of operational events for each service request to City Link. This mapping will start from the citizen’s initial City Link contact to the integration with back-end work order systems, then back to City Link staff with status updates that will be available to the public.

The new system will enhance the capabilities of keeping the public informed as to the status of open requests. These capabilities will include the request status and event notifications such as Creation, Status Changed, and Closed. Citizens will have the ability to view the current status on a web portal. They can also request notifications through communication updates via email, phone calls, and/or text messaging. These features will allow us to close the loop from the original citizen service request, providing a transparent public view of the service request life cycle.

The proposed contract with Rock Solid totals \$101,128 for project implementation and first-year hosted subscription fees. The on-going annual subscription fees will be \$68,628, with no annual increase for years two through six. The total six-year cost will be \$444,268.

1 st Year Cost	2 nd Year Cost	3 rd Year Cost	4 th Year Cost	5 th Year Cost	6 th Year Cost	Total 6 Years
\$101,128	\$68,628	\$68,628	\$68,628	\$68,628	\$68,628	\$444,268

Funding for all implementation costs and first year subscription fees is available in the FY 2018-2019 I.S. capital budget. Staff recommends that the City enter into a contract with Rock Solid for the new Customer Relationship Management system.

M/WBE comment: Notifications were sent to all local M/WBE and area HUB businesses on a weekly basis. The bid opportunity was advertised on the City and State of NC Purchasing websites. See Exhibit A for a complete list of businesses notified of this bid and the workforce demographics of Rock Solid.