

Information Item

Date: August 27, 2018

To: The City Manager

From: Tom Kureczka, Chief Information Officer

Subject: 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



Replacing the City's current Customer Relationship Management (CRM) system is an Information Systems Key Work Item. The current system was implemented in 2004 in the early days of the Call Center services provided by City Link staff. While staff has upgraded the system with vendor updates periodically over the years, the system does have critical limitations. The vendor now offers a newer solution built on advanced technology, thus has provided limited upgrades to the product that the City owns. The current system has some spatial features and interfaces to the City's Geographical Information System (GIS), but these are limited and not maintained at the pace of technology updates as applied to the GIS platform. The current system does offer some reporting and integration capabilities with our back-end work order management systems, but these 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 by using the review and selection criteria as defined in the RFP the list was narrowed down to five. Staff has completed on-site demonstrations with all five vendors.

Staff recommends a preferred vendor's solution for meeting our needs. This vendor's proposal includes sub-contracting with a local long-time established M/WBE for project management and implementation services. Staff is working on a statement of work and pricing with the vendor, with costs expected to be within the range of our budgeted funds of \$125,000. Staff anticipates presenting a request to City Council in October for approval to proceed with a contract.

The implementation will include business process analysis and mapping of the entire sequence of operational events for each service request to City Link. This 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. This 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.