CITY OF SAN DIEGO

CUSTOMER EXPERIENCE & SERVICE DELIVERY (311) IMPLEMENTATION PLANNING PROJECT

FINAL REPORT

The City of SAN DIEGO

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1 EXECUTIVE SUMMARY

The City of San Diego (City) has been investigating deploying a Customer Relationship Management (CRM) application and a centralized, non-emergency 311-style contact center to improve customer service and better manage resident-facing interactions. In 2015, the City established its intent to move forward with this initiative by hiring a 311 Project Coordinator and appointing the Performance and Analytics Department as the project's sponsor.

A CRM application can drive many benefits for the City; the primary ones include:

- Reduce call wait times and increase the efficiency and effectiveness of its 911 communications center
- Provide customers easy access to City services and an enterprise-wide knowledge base of City articles
- Provide trackability and accountability of customer-generated service requests to help improve City service delivery.

To support the City's efforts, Stern Consulting was hired to assess the City's organizational readiness, capabilities, and capacity, and deliver a roadmap to implement a 311/CRM system. To complete our task, the consultant engaged City staff from throughout the organization in an information gathering process using surveys and on-site interviews. The information secured included call volume activity, average talk time, redirected calls, existing systems and methods used to capture data. Also included were planned initiatives that may impact the organization or individual department's readiness, capacity and capabilities. This process allowed the consultant to make informed recommendations associated with a CRM implementation, including estimated CRM software costs and CRM phasing and staffing options.

The table below outlines one-time and on-going costs associated with the phased-in implementation of a 311/CRM system over 5 years. Cost details are provided in Section 5.

311/CRM Implementation Costs Over 5 Years		
Item	**One-Time**	**On-Going**
Year 1 (FY 2017)		
Start-up costs for external consulting services and additional telephony equipment	$400,000	
City-personnel to support program		$453,845
Non-Personnel Expenses (NPE)		$366,500
Year 2 (FY 2018)		
Professional Service Fees for Software Implementation, Training, Software Integrations, Project Management, and related services.	$1,500,000	
Software licensing fees to acquire CRM software	$900,000	
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Year 3 (FY 2019)		
Software licensing fees to pay for the CRM software upgrades and maintenance		$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500

	One-Time	On-Going
Year 4 (FY 2020)		
Software licensing fees to pay for the CRM software upgrades and maintenance		$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Year 5 (FY 2021)		
Software licensing fees to pay for the CRM software upgrades and maintenance (new users and departments will be added to the system, resulting in additional one-time costs)	$250,000	$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Total	**$3,050,000**	**$1,191,500**

Notes:

1. The $575,000 figure is based on the centralized contact center model. The cost would increase to $650,000 under the "no contact center" scenario, as identified in Sections 4.2 and 5.
2. This figure excludes costs associated with call-taking contact center employees as these positions would be reallocated from other departments.

We recommend the City phase its 311/CRM project to include the following departments in the first phase:

1. City Information Line
2. Transportation & Storm Water (TSW)
3. Environmental Services Department (ESD)
4. City Clerk – Passport questions and appointments only
5. Public Utilities Department – non-account issues only
6. Code Enforcement (Citywide) – intake and information
7. 911 Non-Emergency call triage

A focus would be to ensure that customers can connect with the City through their preferred communication channels. As a start, this means improving online and telephone-based contact methods. Online self-service options can be established and made easier to use; at the same time telephone systems can be upgraded for easier access to services in preparation for the CRM implementation. Additionally, the City may wish to consider concurrently optimizing existing contact center resources (Police 911, Public Works Dispatch ["Station 38"], Storm Water, etc.) and to offload, specifically, police non-emergency line calls. Please note, that unless otherwise stated, cost information is in 2016 dollars and should be used for planning purposes only.

The Phase 1 teams were selected based on the type and volume of intake as well as support from all levels of personnel interviewed within those teams. For example, the types of services delivered by ESD and TSW are a traditional Phase 1 CRM team as their workflow fit nicely with the structure of a CRM application. The other teams including Public Utilities, Code Enforcement, and 911 non-emergency process a significant amount of information-only calls and escalated requests for service that may have gone unfulfilled. The nature of these types of calls is congruent with the scope and tools available in a 311/CRM system.

The 311 system could help offload certain 911 non-emergency calls, which total more than 252,000 annually, though it will not occur quickly. Customers will need to be educated that

a 311/CRM system is available and the 911 personnel need to re-enforce that message when they answer the non-emergency calls. The 911 team strongly supports the concept of a 311 system (including a contact center) and believes that the customer experience will be enhanced by having a dedicated team of trained City staff process their non-emergency calls, so that their focus can be on Police-related emergencies.

The consultant's rationale for segmenting the City's departments by phase are detailed in Section 2.5. It is recommended that after each phase is completed, the City's 311/CRM project team revisit each department to ensure that they are prepared to migrate their operations to a 311/CRM model. Once 311/CRM launches, departments listed in a future phase team may desire to get pushed forward to adopt 311/CRM in an earlier phase.

The consultant agrees that Performance & Analytics is a logical option for housing the new 311/CRM team. Due to the enterprise-wide nature of the 311/CRM team's scope of operations, this reporting structure will help ensure that the team remains focused on customer service delivery for all business units.

Lastly, the consultant believes San Diego is at a key moment in that if the 311/CRM initiative is not moved forward timely on a citywide basis, internal momentum and support may wane and some departments may decide to pursue a solution independently, or continue supporting their own home-grown system, which will increase costs and adversely impact the ability of the organization to implement a citywide system. In summary, our recommendations for San Diego are to:

- Move the 311/CRM initiative forward expeditiously
- Use a phased-in approach, leveraging the resources of every Phase 1 team plus the City's communications and social media team, Information Technology (IT) Department and Human Resources (HR)
- Build the internal 311/CRM project team from one to four personnel
- Establish a goal to select a CRM application and have the contract negotiated by June 2017, so the implementation can begin in July 2017.

The consultant believes that the City is ready for this initiative, with the necessary capabilities and capacity and maybe most importantly, as noted in its strategic plan, the passion to provide high quality customer service. However, in addition to these critical success factors, local political and cultural considerations are very important and the consultant attempted to be equally cognizant of these factors throughout our engagement. Our goal in writing this report is to provide San Diego with a roadmap that can be used to implement a 311/CRM system, and through the rapid deployment and use of emerging technologies, including cloud, social, and mobile, become one of North America's most advanced cities.

2 INTRODUCTION

2.1 Project Introduction

The City of San Diego has embarked on an initiative to begin planning for the potential implementation of a 311/CRM solution. The initiative was sparked by San Diego's desire to:

- Unify and simplify the customer-generated information and service request processing for staff across the City and enhance customer service and efficiency through the use of digital, mobile, and social media technologies.
- Support building a centralized knowledge base of City-generated content
- Provide customers multiple channels to communicate with the City government with the goal of achieving a "no wrong" doors principle
- Improve the already high level of customer service in a more efficient, economical, and effective manner
- Improve transparency, accountability and openness
- Develop a strategy to keep up with customer demand for technology, convenience, service expectations, and relationship building
- Address limited and inconsistent reporting capabilities
- Collect data to analyze for improvement opportunities
- Re-tool business processes to be streamlined and promote internal efficiencies.

In March 2016, San Diego engaged Stern Consulting to assist with the development of CRM deployment road map and potentially implementing a 311 contact center. The project also focused on learning about other systems such as SAP and Accela that are complementary to a new CRM system and could be integrated with CRM. In addition, though not the initial focus, the consultant collected information on determining if a centralized non-emergency contact center (i.e., a 311 contact center) could be deployed in conjunction with securing a new CRM system. Though this project may lead to the procurement of CRM software, this document is not designed to be an RFP and/or requirements document. Should the City achieve the appropriations to move this initiative forward a separate RFP and requirements document will be developed.

To support the data collection, the following efforts occurred:

- Surveyed the City's main customer contact points
- Solicited input from department directors
- Conducted on-site interviews with 35 personnel from 15 City departments
- Confirmed call volume and contacts made through other channels with internal San Diego records
- Conducted a high-level benchmarking assessment of the largest 20 US cities by population and their usage of CRM

The interviews, which were typically team-based, followed the format detailed below.

- Explanation of the benefits that a CRM solution can provide including:
    - Providing a single point of contact for customers to interact with San Diego
    - Increasing responsiveness to customers
    - Reducing the number of misdirected calls
- Discussion of the different components of a CRM system
- Confirming information about the department provided by the employees and an overview of the information requested in the survey

- Encouraged staff to share their ideas regarding their customer information and service request processing
- Discussion of how the staff handled information requests, call escalations, and re-directed calls
- Overview of how a CRM capability works and the roles the departments play in the overall process of handling customer interactions. Among the points emphasized were:
    - How a CRM solution might enable a department to free up resources from routine customer inquiries and focus more on the core competencies of their department
    - The importance of a collaborative effort to determine which customer servicing activities might be shifted to a CRM solution and how that would impact existing processes
- Collected feedback on which departments/teams the respondents felt would make a good phase 1 team.

2.2 Key Survey/Business Case Findings

The key findings revealed that while there is an emphasis and focus throughout San Diego on providing high levels of customer service, there are opportunities for improvement, which are indicated below. The consultant believes that the City has a strong need for a CRM system with a centralized customer contact intake function as this could address many of the issues cited below.

- There is no centralized Knowledge Base (KB) of Frequently Asked Questions (FAQ) that is updated and can be accessed by customers and City staff, making it challenging to locate accurate information to address an issue immediately.
- Departments, including Police non-emergency, TSW and the Council offices frequently act as a switchboard transferring calls to other departments or initiating emails to the servicing department to process a customer request.
- In an effort to provide exceptional customer service, in some cases employees will go above and beyond to assist a customer that has called the wrong contact center; this encourages customers to continue to contact incorrect departments, which reduces overall efficiency.
- There is no consistent approach or established methodology to service request processing, ranging from handwritten notes and home-grown systems (SWIM, EPACS) to robust software applications such as SAP, Accela (in 2017), and ManagerPlus. In addition, it is challenging to provide real-time status information on service requests.
- There is no integration amongst the City's key work order/service request processing systems.
- For requests, front-line employees act as independent departments with limited knowledge of each other's operations and business.
- There is no consistent Service Level Commitment (SLC) metric to share with customers or a consistent "closing the loop" process to ensure customers are satisfied with the service they received. A SLC is a commitment by the City to complete a specific customer request within a prescribed period of time (i.e. response time).
- City departments each have limited knowledge of others making it difficult for staff to locate the information or staff to address an issue.
- Customers frequently attempt to navigate the system by calling and/or emailing multiple departments with the identical service request with the objective of

receiving quicker fulfillment. This creates confusion amongst the City departments and duplication of efforts.
- Customers may call multiple departments in an attempt to secure the response they desire. Due to a lack of a centralized KB, City staff who may not be the subject matter expert provide answers which may not be accurate or consistent.
- There is no integration of customer intake channels.
- Emerging channels such as social, mobile, and chat are not being leveraged.
- There is no shared database that contains customer profile data or data regarding their reported issues. In addition, there is no centralized data warehouse that provides actionable data and performance information in easy to understand reports that can be leveraged to improve service delivery while incorporating customer feedback into the performance improvement process.

A large majority of personnel felt that a CRM solution would greatly enhance their ability to better serve customers, improve internal collaboration, and strongly feel that San Diego should pursue procuring CRM software. Though a CRM solution would appear to be a better fit in some departments, personnel from every proposed Phase 1 team were interested in CRM as they believed it would have a positive impact on their operations and welcomed the opportunity to utilize the CRM system.

2.3 Lessons Learned from Previous CRM Deployments

Of the top 20 U.S. cities based on population only San Diego, Phoenix, and Jacksonville do not have a CRM system, and as of March 2016, Jacksonville is in the process of procuring a new system. In addition, there are more than 300 deployments of CRM software throughout North America. As such there are several lessons learned that San Diego can leverage from these previous implementations, including:

- Use CRM as an opportunity to conduct a Lean/Six Sigma analysis of the City's existing processes to take advantage of the functionality of the CRM software
- Ensure that a detailed change management plan is developed and executed as CRM impacts a wide range of employees and their responsibilities
- It will take significant resources to build a knowledge base
- There needs to be dedicated IT resources on the implementation planning team
- When developing the CRM requirements, delineate between *must haves* and *nice to have*
- If the City is considering telephony changes and/or upgrades in conjunction with CRM, it is critical that they align in the master project plan and contingencies are noted
- CRM software is typically configured to work in a centralized intake environment. Should that not occur, the software may need to be re-configured
- Ensure that the vendor offers on-site in addition to remote support
- After the vendor has been selected, but prior to the contract being finalized, the City's project team should work on project planning.
- The City should investigate software options prior to issuing the RFP. That would help narrow the field and save resources during the procurement process
- For proposal responses that are being primed by a System Implementation/ Integration (SI) firm, (sometimes referred to as the "integrator") it is critical to understand their CRM deployment expertise, in addition to the actual software.
- Municipalities that are considering CRM and do not have a centralized call intake center, are investigating an incremental approach to centralizing calls such as using

remote agents and actively attempting to transition customers to self-service channels, pushing the decision to centralize calls into a future phase.
- Larger, more complex municipalities investigating a new centralized intake center, or even implementing a new CRM application in an existing centralized contact center, are pursuing an incremental, phased approach with a smaller subset of teams/ departments to minimize change management and user adoption issues and to more seamlessly transition customers to the new operational model.

2.4 Innovations with CRM

As San Diego has recently started considering CRM, they can take advantage of new technologies and approaches that were not previously available. The recently completed resident satisfaction survey (2015) indicates that most respondents would prefer to utilize the web site (50%) or a mobile app (20%) to report a problem, rather than making a phone call (13%). Though customers have indicated a preference to using self-service channels, the City must be able to communicate with customers on a variety of communication channels and should evaluate how customers are served by the different channels (telephone, web, social, mobile) to continually improve the customer experience. In addition, the City should take advantage of the following innovative functionality when processing customer inquiries:

- **Usage of remote call intake agents**. Should the City decide not to deploy a centralized contact center, many municipalities are successfully using remote employees to process customer requests through using Software as a Service (SaaS) CRM and SaaS call intake technology. If the City opted to build a centralized contact center, remote agents can be quickly brought on–line to handle call volume increases that typically occur in adverse weather conditions or with special events.
- **OmniChannel intake**. As the number of options available to customers to contact a city increase (e.g., web, mobile, social) the City can process an intake request through one channel and provide updates through a different channel. By aligning the different communication channels on a single platform the customer has choices on how to communicate with the city, and the City has the opportunity to use a lower cost/more efficient channel to communicate back.
- **Personalization**. Based on previous interactions, CRM systems could personalize the user experience. By storing information on prior interactions and leveraging business analytics software, CRM systems could help predict when users would interact and the manner in which they would desire to interact.
- **Personalized Advice/Skills-based Routing.** CRM software should be able to identify a customer by their phone number, email, etc., and then route that customer to a specific agent based on their previous interactions.
- **Real-time, In-field Collaboration**. A customer service agent can collaborate in real-time with field personnel to secure instant input and escalate cases to the right expert. For example, a field crew receives a service request (SR) on their mobile device. The crew leader can update the SR details in the field, including voice transcription. The customer then receives email updates as a request is worked on through their mobile device or preferred channel.
- **Social Media Tools.** New social media tools incorporated within a CRM platform enable municipalities to participate, learn, and utilize information gleaned from social channels. By harnessing this information, cities can then deliver content to targeted populations and better anticipate customer needs. These tools are not so much designed to allow cities to control these social conversations, but rather to participate and understand. Most importantly, social media tools detect and reveal

larger trends related to government agencies, and give one the ability to drill into the message detail to see what's driving that trend.

2.5 Phased Approach

The greatest likelihood to ensure a successful 311/CRM deployment is to phase in departments. Typically, when municipalities try to bring too many departments into CRM simultaneously it does not meet expectations. Based on the employee interviews, we recommend that a phased approach involving the following departments would lead to the greatest likelihood of success:

Phase 1	Phase 2	Potential Future Phase[2]
Transportation & Storm Water (TSW)	Public Works (including the Utilities Undergrounding Program)	Public Utilities (account management)
Environmental Services Department (ESD)	Mayor & City Council (constituent service enhancements)	Parking (City Treasurer)
City Clerk – Passport questions and appointments only	Park & Recreation (P&R)[1]	Development Services Department (DSD) – non-technical, non-complex inquiries
Public Utilities – non-account issues only[3]	Communications Department (social media enhancements)	Economic Development / other departments utilizing the CRM software platform
City-Wide Code Enforcement Intake & Questions[4]		
911 Non-Emergency (including abandoned vehicles)		
City Information Line		
Webmaster - Dept. of IT (Email General Questions)		

Notes:

1. This recommendation is contingent on P&R building their knowledgebase content and enhancing the GIS system to more accurately reflect the location of physical assets.
2. Based on interviews with Development Services, the consultant believes that their processes are not an optimal fit for a CRM service request processing system, and therefore should not be included in Phases 1 or 2. In addition, the Parking team is currently procuring new software to help manage their operations and adding them to the CRM system would create additional integration, resourcing, and change management issues for their team. Though their operational model may be a fit for CRM, the timing is not ideal to introduce CRM in Phases 1 or 2.
3. Public Works Dispatch (TSW/Station 38) currently handles sewer emergency calls (24/7) and water emergency calls after-hours; we are discussing this proposal further with Public Utilities. The Public Utilities Dept. recently deployed new account management software and restructured their team, so introducing all the CRM functionality to this group would not be an ideal fit at this time.
4. Code Enforcement City-wide involves the following departments: Development Services, Transportation & Storm Water, Environmental Services Department, Park & Recreation, Fire-Rescue, Police, City Treasurer, and Public Utilities.

The following departmental factors were considered in making this phasing approach:

- Most prepared
- Most supportive

- Have pain/issues that 311/CRM can immediately and successfully address
- Intake volumes
- Nature/Type of citizen interactions
- Director, manager, and staff level commitment
- Scale, size, and volume of service requests
- Have a high probability of success, and serve in an ambassador role for other departments/agencies

In addition, the following items were considered when segmenting the departments between Phases 1 and 2:

- Change management issues
- Technology adaptability
- Department's concurrent projects, and those that will begin in the next 12-24 months
- Resource/bandwidth constraints

In previous CRM projects the consultant has worked on, the following teams are typically selected as Phase 1 teams due to the nature and type of their service and information request processing:

- Public Works (street and graffiti issues)
- Environmental Services (trash and recycling)
- Traffic Services (street lights and traffic signs and signals)
- Utility/Water (account management, turn-off/on)
- City Manager and Mayor offices (typically information and/or escalated calls)
- Code Enforcement (violations, citations)
- 911 non-emergency calls

2.6 Current State Call/Contact Metrics for the Proposed Phase 1 Teams

The detailed incoming contact metrics for the identified Phase 1 teams (per section 2.5) are located in *Section 9* of this report. The summary by intake channel is detailed in the table below. Not all contact metrics are tracked in the same manner. These numbers represent a combination of data and best estimates.

Channel	Monthly Amount
Phone	47,627
Web	1,334
E-mail	1,976
Walk-ins	1,113
Citizen Route Slip Processing (IQ)	50
Voicemails	2,480
After Hours Calls-Sent to Station 38	1,235

3 SAN DIEGO'S GOALS AND OBJECTIVES

3.1 CRM Project Objectives

Should the City move forward with the CRM project, the following objectives should be established:

- Develop an updated customer service strategy to keep up with customer demand for technology, convenience, service expectations, and relationship building
- Create an approach to address calls/service requests in a more consistent manner
- Improve departmental collaboration, which while often effective, can be inconsistent without adequate communication tools
- Create a centralized FAQ database for use on the City's website and internally for handling customer inquiries
- Enhance enterprise-wide data sharing
- Develop consistent Service Level Commitments (SLC)
- Provide integrations between service request and work order management systems
- Develop executive-level reports that contain actionable, real-time data on customer service request processing
- Provide a consistent on-line presence for customers to conduct City-oriented transactions.

3.2 Improvement Opportunities

In previous CRM implementations that the consultant has been involved with, the more successful projects involve utilizing a Lean/Six Sigma approach to map and update business processes as needed to take advantage of the CRM functionality. When pursuing a Lean/Six Sigma initiative, it is suggested that the desired attributes of the future state processes could include:

- Customer insight
- Accessibility
- Simplicity
- Consistency
- Transparency
- Accountability
- Organizational performance

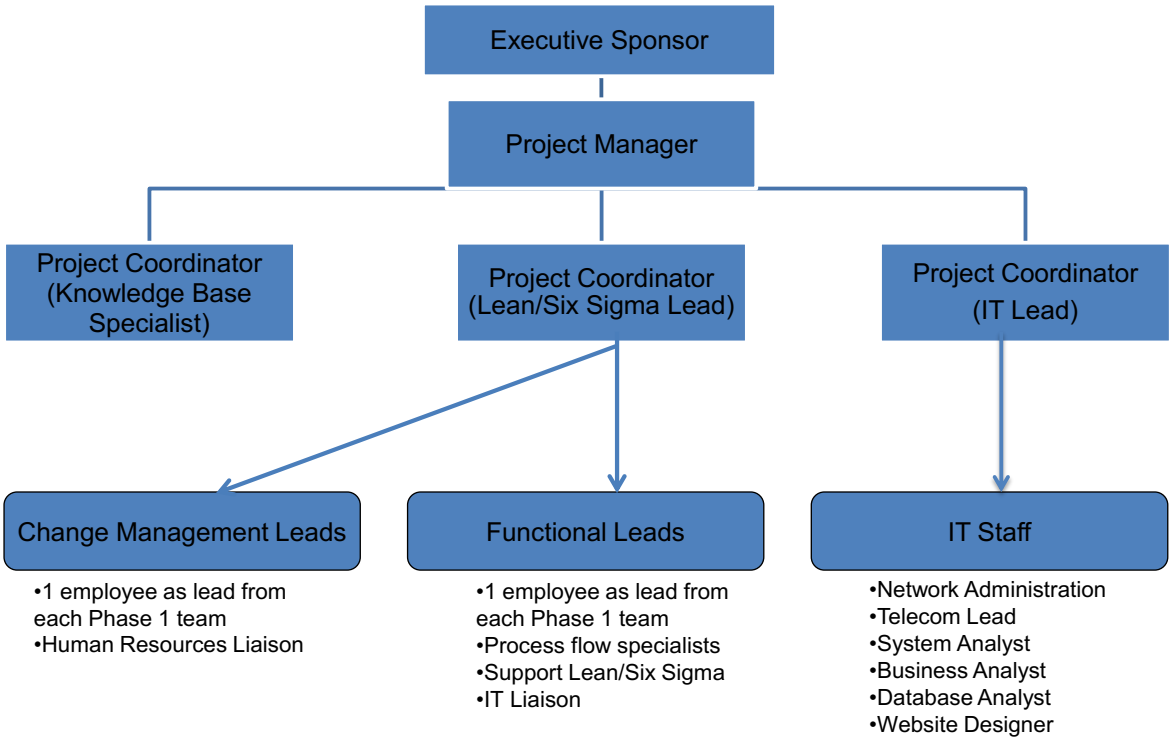
The Lean/Six Sigma approach should help clearly define business processes and prioritization requirements. In addition, it could help establish and define key performance indicators and service levels, and be used to support the City's open data initiative.

Building a City-wide "knowledge base" will be one of the first projects undertaken. Known as the "single version of the truth," the process of drafting these "how to" articles will reveal areas for improvement. This information building process will involve reaching across departmental boundaries to reconcile inconsistent practices across the City. The knowledge base will support the retention of institutional knowledge and facilitate new employee on-boarding and training.

4 IMPLEMENTATION PLANNING

4.1 Proposed 311/CRM Implementation Project Team

The graphic below presents the proposed implementation team the City should structure to help manage the project moving forward, including procurement of the CRM software and eventual implementation of the 311/CRM solution.



To help facilitate this new structure, four City positions are required: one Program Manager and three Project Coordinators (one specializing in Lean Six/Sigma, an IT Lead, and a Knowledge Base Specialist).

It is critical to have a full time knowledge manager (KM) lead to start collecting knowledge base (KB) articles for all City departments, not just the phase 1 teams. It is estimated that 66%-75% of all incoming City inquiries will be for information. Therefore, by collecting, collating, and placing all City information in a single easy-to-access module, the City could expect to experience significant efficiencies in processing information requests. The volume of the City information is immense and requires at least one full-time person to begin this process. In addition, after an initial inventory of information is completed, the City may want to consider a combination of hiring interns and working with a content development consultant to support this staff member in the KB development. Regardless of which CRM software is selected this task needs to be completed by the City and it will be leveraged into the new CRM application.

In most cities that are deploying a CRM application the best place to start collecting the KB articles is via the city's website as that typically is the most updated content. In addition, the KM should identify knowledge liaisons in every City department who can validate the accuracy of the website content as well as contribute new content. Securing this position is a critical success factor for this project. The KM should investigate the KB module of leading CRM software to provide a template for how the data should be displayed. This would

include key word search, hyperlink placement, and authorship tracking, among other features. Because the City is currently in the process of updating its website content, the timing for developing a KB is ideal.

4.2 Transition Planning for a Centralized Contact Center

We recommend that in addition to securing a CRM application, the City consider building a centralized contact center on City property in a to-be-determined location. The costs for reconfiguring an existing City location for a centralized contact center may be offset by lease cost reductions to existing space where current contact center personnel are located, which would become vacated.

Regardless of the direction regarding a contact center, the City should secure and utilize the 311 telephone number. All contact center staffing will come from existing San Diego personnel, focusing on the Phase 1 teams for the call intake personnel. In addition, the largest volume of calls will be coming from the police non-emergency line. Currently callers to this line are experiencing long wait times. There are many open job requisitions for 911 and should the City decide to implement this recommendation, some of the job requisitions could be transitioned to the 311 contact center.

Staffing Options – Centralized Contact Center

Based on the current call volumes for the proposed phase 1 teams, the City would require 21 contact center agents. In addition, the following personnel would be required to staff the contact center:

- 311/CRM Supervisor (2 FTE)
- Business Analyst (1 FTE)
- Content/Knowledge Base Manager (2 FTE)
- Trainer/Quality Assurance (1 FTE)
- Reporting and Analytics Manager (1 FTE)

The non-call taking personnel could be transitioned from the 4-person project implementation team detailed in Section 4.1. The contact center agents and supervisory personnel could be transitioned from the targeted Phase 1 teams. Below is the current call intake headcount from those teams (please note that some call intake personnel may need to remain in their current department):

Phase 1 Team	Number of Personnel
ESD	7.5
TSW (Station 38)	16 (Some personnel could remain in that team for dispatching)
City Information Line (part of the HR Dept.)	2
Webmaster	.20
City Clerk	.25
City Wide Code Enforcement	TBD
Police	134 positions and 22 vacancies
Public Utilities Dept. (PUD)	39

Please note that if personnel and/or open job requisitions are transitioned from Police to the 311 team, that will result in a cost savings to the City as Police dispatch positions typically have a higher salary. Positions with 311 will not require the same Police dispatch background check process, which will facilitate the hiring process. In addition, this would help reduce the Police department's turnover rate, thereby decreasing their training and recruiting costs. Lastly, the City could expect to see the remaining Police employee's job satisfaction increase because their call volumes and stress levels would be reduced.

The growth of the contact center agents may be limited in the future if residents continue to show a preference for online service options. When customers call the contact center they would be encouraged to utilize other less costly self-service communication channels. In addition, the City's Single Sign-on initiative is designed to push more transactions to self-service. These approaches could help manage the actual call volume, (and contact center staffing) that the City is processing, even as new teams transition onto CRM. The results of a recent customer survey indicated that residents were receptive to transitioning their interactions to self-service options. Therefore, once the City makes them available and leverages the contact center to communicate these options to residents, the volume of self-service options should increase. This would limit the growth contact center agents and provide the City more cost certainty from a staffing perspective. In addition, the growth of natural language voice recognition software and use of online Intelligent Virtual Agent (IVA) technology could minimize additional staffing needs.

Historically, when a centralized contact center is introduced, the actual number of calls processed has a tendency to increase initially, because customers start using that channel because they realize it generates results for them. The overall number of calls may increase 10%-25%. However, this number is sometimes challenging to quantify because cities typically do not have accurate pre-contact center metrics. As new communication channels get introduced, it is common for the call volumes to be reduced, however not necessarily in a 1:1 ratio because the new channels engage some new customers that have not been previously interacting with the City, therefore a channel shift is not occurring.

The consultant suggests that additional discussion occur on this recommendation prior to moving forward. It is possible to deploy a CRM in a non-centralized environment; however, the City can expect to secure additional customer service processing efficiencies if a centralized contact center is also deployed. Should the City decide not to initially deploy a centralized contact center, the consultant suggests initiating the researching of the contact center component in July 2017.

Staffing Options – No Centralized Contact Center

If San Diego does not pursue a centralized contact center, the following personnel would be needed to operate the CRM team:

- Business Analyst (1 FTE)
- Content/Knowledge Base Manager (2 FTE)
- Trainer/Quality Assurance (QA) (.5 FTE)
- Reporting and Analytics Manager (1 FTE)
- Decentralized Contact Center Coordinator (1 FTE)

The staffing for this team would come from transitioning the project implementation team positions and hiring 1.5 FTE for the Trainer/QA role and the Decentralized Contact Center Coordinator.

The following tables present the pros and cons of a centralized and decentralized contact processing function. Based on the consultant's experiences, these are generally agreed to as the pros and cons and they **may not all be relevant** to San Diego.

Centralized Call Processing

Pros	Cons
Creates sense of a dedicated team with a unique team culture located together	Higher initial costs for contact center build out due to centralizing personnel and related work spaces
Efficient supervision and call escalation approach as a result of all personnel being in the same location	Space limitations due to moving and consolidating personnel
Ability to deploy a consistent marketing/outreach message both internally and externally regarding the launch	Longer to initially deploy as typically the build-out requires more time
Single point of contact internally as issues arise	[redacted]
More efficient load balancing of incoming calls and reduced number of call transfers due to call intake personnel being co-located	

The table below presents the pros and cons of a decentralized call processing function. As previously noted, these are generally agreed to as pros and cons and they may not be all be relevant to San Diego.

Decentralized Call Processing

Pros	Cons
Less expensive for the initial build out	Tendency to automate existing poor process because call inflow procedures are not changed
Departmental personnel remain in their current locations	Could be more difficult to supervise; potentially inconsistent service level delivery; inability to load balance calls across departments; and lack of consistent quality control
Quicker to deploy due to less re-configuration required	Could be more expensive if the solution is eventually converted to a centralized contact center in the future as the organization may incur additional relocation costs
Call takers could continue working on departmental projects in addition to their call taking responsibilities	Higher risk of customer confusion on whom to call due to the presence of multiple intake centers

If the City decides not to pursue a centralized contact center, then the Clerk, Code Enforcement intake, and police non-emergency call triage may be dropped from Phase 1 as

the primary rationale for their inclusion is that the contact center would assume their calls/contacts. It is possible that some of the contacts from these teams could be absorbed via mobile or web applications, however all the calls would not be transitioned to that channel. In addition the TSW/Station 38 operation would still be segregated into a dispatch and call intake function, therefore, no economies of scale could be secured with the intake operation. This is a **critical decision point** as telephone inquiries will not be zero for the foreseeable future, and a centralized contact center would make it significantly easier for customers to secure accurate information in a timely manner via their preferred communication channel.

If a centralized contact center is deployed the City could expect to secure the following benefits:

- Reduce call transfer/re-directions
- Reduce call wait times
- Reduce agent average talk time
- Reduce call abandonment rate
- Reduce the police non-emergency call volumes
- Potentially reduce the employee turnover on the police non-emergency team
- Enhance customer satisfaction

Another critical point is that the contact center would also process customer self-service transactions, in addition to the calls. In other CRM deployments, contact center employees have performed the following duties regarding incoming requests:

- Facilitate on-line chat and/or co-browse sessions
- Review incoming mobile or web self-service requests from a quality assurance (QA) perspective prior to forwarding them to the fulfillment department
- Maintain knowledgebase articles; re-write poorly rated articles
- Monitor social media accounts from a service and information request perspective
- Act as a Customer Advocate and resolve customer complaints

4.3 Suggested CRM Software Requirements

The development of CRM requirements matrices will be a critical component of the RFP. The output will consist of spreadsheets highlighting the requirements for the Phase 1 departments. The IT team should be actively engaged in this data collection process. In addition, since CRM will be serving as a new development platform for the City, it will be important to engage Phase 2 and 3 teams, such as Economic Development, in the data collection process since they may be able to leverage the CRM functionality in the future. Based on previously completed assignments, it is projected that more than 450 requirements will be developed and categorized into the sections detailed below.

Service Requests

- Provides ability to automatically route customer requests and items to the appropriate provider, department, or staff for prompt action, to notify the department that the request is in queue, and to allow the department to forward the request to another department if necessary
- Provides ability for the user to select the service request category from a drop-down list
- The solution provides the ability to link forms (e.g., PDF) and other documents (e.g., pictures) to requests.
- The solution provides the ability to display recently closed (and transferred) service requests when the agent enters an address.

- The solution requires user confirmation of a deletion.

Knowledgebase

- Provides an easy to use online topic, phone, service directory searchable by name, service provided, or department
- Allows the knowledge base to be available to employees and customers over the web (mobile friendly)
- The solution allows a knowledge base to be integrated with a script.
- The solution provides the ability to monitor, maintain, and archive articles.
- The solution provides the ability to locate and identify duplicative knowledge base information.

Reporting and Query Capability

- Provides ability to generate reports based on a set of key performance indicators, as designated by the City
- Allows reports to be viewable on the screen, in hard-copy format, or over the web
- The solution provides the ability to print copies of records, standardized forms, emails, and letters.
- The solution provides the ability to create reports on a real time basis.
- The solution provides the ability to create triggers to compare forecasted data to actual data.

GIS

- Provides ability to use City GIS data for all geospatial applications
- Allows updates of attributes data for assets, whether managed in GIS or Work Order
- The solution provides the ability to update reference inventory and/or assets on a GIS data layer as prescribed by specific task(s), including the ability of authorized personnel to edit the GIS data layers containing the assets.
- The solution provides the ability for basic map navigation, including the ability to zoom and pan.
- The solution provides the ability to query from the mapping screen using a simple drawing tool.

Mobile (for both a customer-facing application and mobile field worker functionality)

- Provides access to work orders for selected personnel while away from the office
- Provides ability to support multiple types of wireless devices, including but not limited to: iOS and Android
- The solution provides the ability for residents to view a text-based list of service requests.
- The solution provides the ability to present a user with a view of the relevant individual task lists based on user logon.
- The solution provides the ability for residents to view service requests displayed on a map, including date/time stamping of a service request.

Social Media

- The solution allows groups to establish membership directories or affinity groups (e.g., bicycling enthusiasts, environmental issues, or City volunteer opportunities) and share information that will only be accessible by the group members
- The solution provides the ability to enter service requests via social media tools
- The solution provides residents and groups with the ability to easily share events and news.
- The solution provides calendar features that allow residents to track the latest group and community events.

- The solution allows for the contact center to monitor various social media channels from one unified platform and efficiently respond to questions or create service requests

SaaS (Software as a Service)

- The solution provides patches/upgrades to the application and servers that are included in the hosting services
- The solution provides periodic security audits at the datacenter and annual independent third party security audits, with the results of such audits made available to the City
- The solution provides the ability to ensure that data is protected.
- The solution provides the ability to generate reports on security events.

From an IT perspective, the following categories of requirements will be collected:

- Application security
- Data integrity and availability
- Standards
- Back-up and disaster recovery capabilities
- Records retention
- Telephony and contact center
- Integrations and data conversions
- Network architecture

Due to the multi-channel approach utilized by most 311 systems, it will be important to identify the intake channel for which the requirement is valid. For example, the following would be appropriate channels to incorporate into the requirements data collection process:

- Internal/311 agent
- Mobile field personnel
- Web self-service
- Mobile self-service
- Social media

4.4 Partnerships

As part of our research, personnel from 211 San Diego and San Diego County were interviewed to understand what partnership opportunities would be available should San Diego move forward with CRM. The County is using a referral service line for after-hours incoming contacts, and requests typically get transferred to the Chief Administrative Office (CAO). They are also using a voice recognition call routing system, but there appears to be some limitations with that system. Though the City and County will remain in touch, there is not currently an opportunity to bring the County onto the City's CRM system, or for the City to join the County's referral system, but there may be opportunities for future collaboration.

211 San Diego may be able to assist with certain contact-center related functions in the future, however further discussions and investigation is needed. Issues related to cost, labor relations, and knowledgebase development would need further exploration.

Since these communication channels were opened, the City should keep both organizations appraised of their CRM project.

4.5 Current Software Initiatives

The City is currently in the process of implementing SAP Enterprise Asset Management (EAM), referred to internally as Infrastructure Asset Management ("IAM San Diego"), software to help support the City's financial and infrastructure management operations and Accela to support the City's code enforcement and permitting operations. Neither of these applications have the service and information request processing functionality that CRM has. In many cities, applications such as SAP and Accela are frequently integrated with CRM and share service request and customer-related data across their platforms. CRM software is pre-configured with the following unique modules:

- Knowledgebase and service request initiation and processing
- Rich customer profile data
- Multi-channel integrations
- Advanced analytics and reporting on City's performance
- Social media integration

As part of the CRM deployment, the consultant believes that the CRM software should be integrated with both SAP and Accela to ensure more efficient process of customer requests.

The Environmental Services Department (ESD) is actively pursuing options to replace the legacy EPACS computer system which manages many aspects of ESD's operations. Some components of this system can be replaced by the CRM software and an analysis is underway to determine what gaps exist.

4.6 The 311 Telephone Number

In 1997, the United States Federal Communication Commission (FCC) made 311 available as a means of quick access to non-emergency police and other government services. The FCC stated that use of this code could improve the effectiveness of 911 emergency services by alleviating congestion on 911 circuits. Baltimore, MD was the first city to use 311 and was followed shortly thereafter by Chicago, Dallas, and Houston among others.

The 311 telephone service goes beyond the CRM concept to include a centralized contact center and an easy-to-remember phone number so that citizens have access to a live person. Using the CRM's knowledgebase, contact center agents answer a wide variety of information requests and collect data for service requests which are then passed on to the appropriate service department. The single phone number eliminates the guesswork for citizens trying to determine which phone number to call when they have a problem. In addition, cities with customers whose primary language is not English, typically staff their contact centers with bilingual agents and through the IVR system, the calls can get directly routed to those agents. Chicago, San Francisco, and New York, use this option in their 311 contact centers. In these instances, the knowledgebase articles remain in English and the telephone operators translate while on the call. Via the web, Google Translate is utilized.

Recently, the City contacted AT&T to reserve the 311 phone number. Should the City secure the phone number and deploy a centralized contact center, it is projected to cost $60,000 to initially configure the 311 phone number. However, the City may only purchase the phone number once it decides to deploy it. From a mobile perspective, after the City configures the 311 phone number, the local mobile service providers will activate the number on their networks free of charge.

5 COST ASSESSMENT

5.1 High Level Cost Metrics

Based on recent similarly situated CRM implementation, the consultant was able to calculate an estimated cost for procuring the CRM software and the support and maintenance over the first 5 years. Based on the data collected, the CRM application would have the following components.

- Knowledge base/FAQ module
- Service Request/Tracking module
- Integrated, customer-facing mobile application
- Integration with the SAP Work Order Management module and Accela Licensing and Permitting and Code Enforcement module
- Integration with the City's ESRI GIS application
- Integrations with Twitter and Facebook
- An integrated web self-service presence
- Multi-channel communication support, including live chat
- Potential for an Intelligent Virtual Agent (IVA) component
- SaaS deployment model

Licensing for Phase 1 includes:

- Named licenses for contact center personnel which would include the contact center agents and additional non-call taking personnel
- Concurrent licenses for departmental users, which includes, among others, the following Phase 1 teams:
  1. Transportation & Storm Water (TSW)
  2. Environmental Services Department (ESD)
  3. City Clerk – Passport questions and appointments only
  4. Public Utilities – non-account issues only
  5. Code Enforcement intake
  6. 911 Non-Emergency (including abandoned vehicles)
- Admin/IT licenses

Additional vendor services would include:

- Training services
- Project management services
- Includes *evergreen* policy for software maintenance

311/CRM Implementation Costs Over 5 Years		
Item	**One-Time**	**On-Going**
Year 1 (FY 2017)		
Start-up costs for external consulting services and additional telephony equipment	$400,000	
City-personnel to support program		$453,845
Non-Personnel Expenses (NPE)		$366,500
Year 2 (FY 2018)		
Professional Service Fees for Software Implementation, Training, Software Integrations, Project Management, and related services.	$1,500,000	
Software licensing fees to acquire CRM software	$900,000	

	One-Time	On-Going
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Year 3 (FY 2019)		
Software licensing fees to pay for the CRM software upgrades and maintenance		$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Year 4 (FY 2020)		
Software licensing fees to pay for the CRM software upgrades and maintenance		$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Year 5 (FY 2021)		
Software licensing fees to pay for the CRM software upgrades and maintenance (new users and departments will be added to the system, resulting in additional one-time costs)	$250,000	$250,000
City-personnel to support program		$575,000[1, 2]
Non-Personnel Expenses (NPE)		$366,500
Total	**$3,050,000**	**$1,191,500**

Notes:

1. The $575,000 figure is based on the centralized contact center model. The cost would increase to $650,000 under the no contact center scenario, as identified in Sections 4.2 and 5.
2. This figure excludes costs associated with front-line contact center employees as these positions would be reallocated from other departments.

The following two tables provide additional details on the data in the summary table above.

To complement the CRM software costs, there will be additional City staff that would need to be added to the CRM project team, to support the one existing position as follows:

Full Time CRM Project Team Staff

Position	Personnel Costs
Program Manager	$117,872
Project Coordinator – IT Lead	$111,991
Project Coordinator – Knowledge Base	$111,991
311 Project Coordinator – Process Analyst (current position)	$111,991
Total	**$453,845**

Notes:

1. Three new positions would be added to the current 311 Project Coordinator position. As indicated in Section 4, after CRM is deployed these positions could be transitioned to the full time CRM team.

In addition to the staffing, the following one-time costs would be required to help start up the CRM operations.

Item	Amount
Non-Emergency Phone Line Improvements	$150,000
External professional fees	$150,000
Knowledge base development support	$100,000
Total	**$400,000**

On-Going Compensation Costs

The following table provides the estimated personnel costs in 2016 dollars for the non-call taking personnel that would be required to operate the CRM program

Options	Annual Compensation
Centralized Contact Center	$575,000
No Contact Center	$650,000

Please note that it is assumed that the supervisory and contact center agents would be transitioned from the existing Phase 1 teams so there would not be a net increase in salary, and the City may actually experience a cost savings if some positons are transitioned from the Police Department.

5.2 Funding Approaches

Municipalities vary on how they fund CRM systems. Based on previous implementations, the following funding options have been utilized:

- One-time allocation from the general fund for start-up expenditures
- Using specialized funds such as a Technology Innovation Fund, or similar fund type for start-up operations
- Funding through an NGO (Non-governmental Organization) or a public/private partnership organization, such as United Way of San Diego County or the Knight Foundation or the Bloomberg Foundation
- Securing start-up funding from Enterprise funds such as water/utilities
- Receiving contributions from the departments/teams that will be using the CRM system based on their projected usage levels/pre-defined metrics (e.g., calls, service requests, and information requests). As new departments start using the CRM system, the funding opportunities could increase as well as reduce the funding amounts from the incumbent departments.
- Initial integration fees paid by the user department(s), then on-going costs allocated citywide

Ongoing operations and maintenance funding typically comes from the general fund or the IT department. This decision it usually driven based on which department is responsible for the ongoing maintenance of the application. In some instances where the CRM team reports

to the City Manager or Mayor, the annual funding stream will come from those departments. In other instances where the CRM team reports to the IT team, they would be responsible for the annual funding.

Since the CRM system will replace existing systems such as EPACS from ESD and potentially IQ (in the City council offices), the funding set aside for these systems should be re-allocated to pay for the CRM system. The CRM project team should work closely with the Phase 1 and 2 teams to locate these opportunities and quantify the amounts that could be used for CRM.

6 CHANGE MANAGEMENT PLANNING – HIGH LEVEL

"Change management must be part of the CRM implementation." City of San Diego Program Manager

"We must embrace change. Our citizens expect us to." City of San Diego Deputy Director

The primary objective of change management initiatives is to gain enterprise wide buy-in and acceptance of the "to be" future state. In the case of CRM implementation programs, this typically involves major cultural shifts across multiple organizations. Such changes can be weighed down by politics, tradition, habit, and outdated policies. Successful CRM implementations have overcome these obstacles by assessing the organization's readiness to change, understanding the reasons for resistance to change and addressing each individually. Typically the following types of staff resistance are encountered in CRM projects.

Staff Resistance Drivers

Resistance Drivers	Solution Approach
Loss of Control	Involve in process
Uncertainty	Information Exchange
Too Much "Difference"	Manage Change
Loss of Face	Put past actions in a positive light
Concerns about Competence	Provide Training
Disruption	Provide flexibility
Added Work	Support and reward
Resentments	Identify and address
Threats	Identify the "win-win"

A Change Management (CM) plan provides a framework for fostering acceptance, establishing and maintaining engagement, and assuring commitment from the City's stakeholders. The following stakeholder groups should be addressed in the communications planning process:

- Departmental managers, key supervisors in affected departments
- Contact center staff
- Departmental staff where the CRM system is implemented
- All other employees
- Customers

Based on the interviews, some departments appear reluctant to abandon their technology or let others handle their phone calls because they believe that their phone calls require specialized skill sets to address. Because there appears to be some slight resistance up-front to this initiative, it is critical to create a change management team and develop related messaging to address employee's concerns. The goals of the CM plan should be:

1. Building Organization Infrastructure - working with groups within the HR Department to design and implement organization structures to support the new way of doing business.
2. Monitoring, Evaluating & Realigning Strategies – identifying, assessing, and measuring key performance indicators to gauge success.

3. Engaging, Supporting & Training - helping stakeholders build the skills, knowledge, and competencies to confidently transition to a customer-centric organization.
4. Comprehensive Communication Plans - through various channels and events provide two-way communication with employees and external customers, to effectively move all stakeholders toward change.

The CRM project team should focus on the following tasks during the implementation process:

1. Implementing Change
    a. Build and maintain sponsorship support.
    b. Assess and define work design and HR implications
    c. Develop a high performance project team
2. Communication
    a. Plan communication based on events, stakeholders and media
    b. Develop communication material
    c. Facilitate the execution of the implementation
3. Training
    a. Skills and needs assessment, including impact of training approach
    b. Plan different types of trainings
    c. Develop training materials
    d. Pilot training courses
    e. Evaluate and update training collateral

7 ROAD MAP

Based on the 311/CRM road map detailed below, San Diego can expect to begin its Phase 1 implementation in July 2017. Once the initial implementation plan is finalized, work on the tasks listed below should begin immediately to support the Phase 1 timeline.

Task	Timing	Key Steps
Project Planning	3 months	– Continue monitoring the "Get It Done" pilot and use the findings to make adjustments to the project plan – Refine the 311/CRM vision and charter – Refine and finalize 311/CRM project governance committee and framework; leverage the incumbent program infrastructure – Update and finalize the 311/CRM project team; initiate process of hiring of CRM project staff – Define the team structure, governance, roles, and responsibilities – Identify and share project objectives and goals – Identify potential service requests to transition to the CRM system from Phase 1 teams and identify back-office system impacts – Establish start-up budget and ensure funding sources for ongoing operations; communicate financial requirements with the budget/finance team and Council – Initiate change management planning for Phase 1 departments by identifying potential change management coaches and an executive sponsor – Maintain Council communication through the executive sponsor – Begin identifying FAQ content for Phase 1 teams and building an FAQ collection template – Identify specific call types from police non-emergency that can be transitioned to the contact center and identify relevant KB article to develop – Upgrade non-emergency telephony technology
RFP Development	2-3 months	– Conduct on-site workshops to define Phase 1 team functional and technical requirements – Build the CRM RFP leveraging the following: existing City templates, this report, "Get It Done" pilot results, previous software RFPs – Finalize vendor evaluation criteria – Develop and release CRM RFP – Initiate change management plan for Phase 1 teams – Initiate education and outreach planning – Identify Lean/Six Sigma opportunities

Task	Timing	Key Steps
Vendor Selection	4-6 months	– Conduct bidders' conference – Develop addenda – Review RFP submissions – Evaluate vendors against prescribed criteria – Conduct on-site demos – Conduct reference checks – Organize site visits to existing 311/CRM implementations – Select vendor – Initiate contract and SOW negotiations – Finalize the contract, SOW, and licensing agreement
Internal Implementation Planning	3 months	After the contract is executed, the City should conduct implementation planning for the Phase 1 departments. The City should remain in touch with the vendor during this period, but the vendor will not start the actual implementation until July 2017, once funding becomes available.
Contact Center Deployment (Optional)	3-4 months Should the City elect to build a centralized contact center, this task would be started after the contract is signed and run in parallel with the Phase 1 Implementation	– Build contact center staffing plan; begin to identify potential candidates to transition into the center – Finalize contact center location and begin design process – Initiate recruiting, screening, and transitioning of contact center personnel – Develop contact center Key Performance Indicators (KPI) – Confirm IT and telecom changes required
Phase 1 Implementation	Starting in July 2017, completed by December 2017 (5 months)	– Define management reporting & information requirements – Develop end-user procedures – Develop and test customizations, reports, forms, automated data conversions & interfaces – Define and execute test plan – Cleanse and convert data that is desired to be extracted into the CRM application – Refine and execute technology plan – Refine and execute change management plan – Develop the communication strategy and related tactics – Continue building FAQ content – Develop related departmental Key Performance Indicators (KPI) – Identify reporting requirements – Confirm IT changes required – Develop staff training materials – Transition employees into their new roles and initiate training – Conduct solution walkthroughs & sign-off – Soft launch of CRM software

Task	Timing	Key Steps
Soft Launch	Starting in December 2017 and lasting for 2-3 months	– Execute transition plan – Perform cutover and go-live – Conduct Quality Assurance (QA) meetings – Conduct post go-live support – **Officially launch the 311 contact center (optional if centralized contact center option is selected)** – Transition appropriate CRM project personnel into the CRM team – Maintain Council communications – Begin sharing results with Phase 2 teams to start preparing them for their eventual transition on to CRM – Identify Lean/Six Sigma and change management personnel leads for Phase 2 teams.
Future Phase Implementation	After the phase 1 teams have been operational on CRM for a minimum of 18 months, the City should start the transition process of the Phase 2 teams onto CRM	– Confirm and/or define future phase (2 and 3) teams – Develop unique CRM for these teams – Identify additional software integrations required and train personnel – Update CRM software as required – Maintain project management infrastructure – Hire and/or transition City staff as required – Conduct vendor communication – Maintain Council communication

The exact timing of these planning tasks will be driven by the overall plan, and slotting the precise timing up-front is not recommended because it should be driven by how successful San Diego has been in meeting the following milestones:

1. Securing funding
2. Making a decision on the centralized contact center and staffing it
3. Selecting the CRM software vendor
4. Negotiating the contract and SOW
5. Securing Council approval
6. Any required negotiations under the Meyers-Milias-Brown Act with recognized employee organizations

8 NEXT STEPS

The graphic below presents the immediate next steps the City should focus on completing in the next 90 days to push forward the 311/CRM project.

Action	30 Days	60 Days	90 Days
Establish project governance committee with an executive sponsor	X		
Present recommendations to Council	X		
Confirm Phase 1 teams readiness for inclusion	X		
Update Council on the CRM project		X	
Start building the internal CRM project team		X	
Complete the Get it Done pilot and analyze results			X
Determine call intake approach (centralized vs. decentralized)			X
Start building the CRM RFP			X

9 PHASE 1 CONTACT METRICS

The table below represents the incoming citizen contacts for the identified Phase 1 teams.

Average Monthly Phase 1 Contact Point Metrics

Department	Function	Phone	Web	E-mail	Radio Transmissions	Walk-ins	Citizen Route Slip Processing (IQ)	Voicemails	After Hours Calls - Sent to Station 38
Transportation & Storm Water	Public Works Dispatch/Station 38	6,345[1]	920	250	5,123	N/A	N/A	N/A	N/A
Environmental Services Department	Customer Service	11,000	414	1,069	N/A	3	N/A	2,480	N/A
City Clerk	Passport Questions/Appointments	675	N/A	3	N/A	Not captured	N/A	N/A	N/A
Public Utilities Department	Non-Account Related Issues	Not captured	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public Utilities Department	Water Emergencies	3,027	N/A	250	N/A	N/A	N/A	N/A	1,235
Public Utilities Department	Report Water Waste	310	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Development Services Department	Code Enforcement Questions/Intake	2,598	N/A	250	N/A	N/A	N/A	N/A	N/A
Police	911 Non-Emergency (inc. Abandoned Vehicles)	21,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Human Resources	City Information Line	2,672	N/A	2	N/A	1,110	50	N/A	N/A
Multi-Department	Code Enforcement Questions/Intake	Unknown	Unknown	Unknown	Unknown	Unknown	N/A	Unknown	N/A
Department of IT	Web Team (Webmaster)	N/A	N/A	152	N/A	N/A	N/A	N/A	N/A
	Monthly Totals	**47,627**	**1,334**	**1,976**	**5,123**	**1,113**	**50**	**2,480**	**1,235**

[1] This number is an approximation of phone calls received from the public and is based on figures from the Public Works Dispatch main phone number (619) 527-7500. As noted in the budget, Public Works Dispatch handles approximately 12,000 calls a month. Public Works Dispatch also answers calls from employees related to dispatch activities, which are received through other internal phone lines.

10 APPENDICES

City Rank (2014)	City	State	City Population (2014 Est.)	Current CRM Tech	Notes
1	New York	New York	8,491,079	Seibel	Currently in contract negotiations with Microsoft and IBM to replace Seibel
2	Los Angeles	California	3,928,864	Oracle	
3	Chicago	Illinois	2,722,389	Motorola	Selected Salesforce, but did not sign contract. Lost funding.
4	Houston	Texas	2,239,558	Kana	
5	Philadelphia	Pennsylvania	1,560,297	Salesforce	Selected Salesforce in 2013 to replace Novo
6	Phoenix	Arizona	1,537,058	NONE	No current plans to procure CRM
7	San Antonio	Texas	1,436,697	Kana	
8	San Diego	California	1,381,069	NONE	Salesforce Pilot
9	Dallas	Texas	1,281,047	Motorola	Issuing an RFP in 4Q16 for a new system
10	San Jose	California	1,015,785	PeopleSoft	Active procurement to replace PeopleSoft
11	Austin	Texas	912,791	Motorola	
12	Jacksonville	Florida	853,382	Home Grown	Active procurement for a new system
13	San Francisco	California	852,469	Kana	
14	Indianapolis	Indiana	848,788	Salesforce	Replaced Seibel with Salesforce in 2015
15	Columbus	Ohio	835,957	Home Grown	
16	Fort Worth	Texas	812,238	RFP released in April 2016	
17	Charlotte	North Carolina	809,958	Kana	
18	Detroit	Michigan	680,250	NONE	Previously had Motorola but shut down 311 center
19	El Paso	Texas	679,036	Accela	Currently testing Public Stuff in a limited pilot
20	Seattle	Washington	668,342	Motorola	Investigated other options but could not secure funding
21	Denver	Colorado	663,862	Salesforce	
22	Washington	District of Columbia	658,893	Salesforce	
23	Memphis	Tennessee	656,861	Considering RFP to procure CRM	
24	Boston	Massachusetts	655,884	Salesforce	Salesforce will replace Kana
25	Nashville	Tennessee	644,014	Active RFI to procure CRM	Released RFI for a new system in January 2016

Employee Interviews

The following City of San Diego employees were included in meetings or one-on-one interviews with Spencer Stern, Stern Consulting, and Alex Hempton, 311 Project Coordinator, City of San Diego in the development of the 311 Roadmap.

Note: Additional employees, not listed below, were interviewed in person, via e-mail, or over the phone in regards to the Customer Contact Point and Department Director surveys.

No.	Name	Title	Department	Dates
1	Alari, DeeDee	Deputy Director	Office of the City Treasurer	3/7/2016
2	Behnke, Jonathan	Chief Information Officer	Department of IT	1/14/2016, 3/9/2016
3	Bennett, Christopher	Application Sourcing Manager	Department of IT	1/14/2016, 3/8/2016
4	Betry, Jody	PMO Program Manager	Department of IT	4/11/2016
5	Bond, Debra	PMO Program Manager	Department of IT	4/11/2016
6	Bui, An	ERP HCM Manager	Department of IT	3/10/2016
7	Cahill, Roxanne	Police Dispatch Administrator	Police	1/14/2016, 3/7/2016
8	Carey, Jonathan	Program Manager	Office of the City Treasurer	1/14/2016, 3/7/2016
9	Carter, Adam	Information Systems Analyst	Office of the City Treasurer	3/7/2016
10	Chadwick, Scott	Chief Operating Officer		4/11/2016
11	Daeschner, Scott	GIS Administrator	Department of IT	3/10/2016, 4/11/2016
12	Davis, Mary	Treasury Systems Manager	Office of the City Treasurer	3/7/2016
13	Dayton, Myrna	Deputy Director	Public Works	3/8/2016
14	Duncan, Michael	CGI	CGI	3/10/2016
15	Fennessy, Brian	Chief	Fire-Rescue	4/11/2016
16	Field, Andrew	Assistant Director	Park & Recreation	3/7/2016
17	Fraijo, Kristina	Program Manager	Human Resources	3/10/2016
18	Gauger, Christiana	Fiscal & Policy Analyst	Independent Budget Analyst	3/9/2016
19	Geiler, Gary	Program Manager	Development Services Department	3/8/2016
20	Giaccaglia, Bob	Admin Aide	Development Services Department	3/8/2016
21	Gibson, Marnell	Assistant Director	Public Works	3/8/2016
22	Gomez, Paz	Deputy Chief Operating Officer	Infrastructure/Public Works	4/11/2016
23	Graham, David	Deputy Chief Operating Officer	Neighborhood Services	4/11/2016
24	Guile, Stephen	Program Manager	Department of IT	3/10/2016
25	Gurrola, Gerardo	Program Manager	Police	1/14/2016, 3/7/2016
26	Howard, John	Program Manager	Environmental Services Department	3/9/2016
27	Kawar, Jeff	Deputy Director	Independent Budget Analyst	3/9/2016
28	Keach, Katie	Director	Communications Department	3/7/2016, 4/11/2016
29	Kiran, Sai	CGI	CGI	3/10/2016

No.	Name	Title	Department	Dates
30	Lamb, Barbara	Program Manager	Performance & Analytics	3/9/2016
31	Leon, Rosalie	Senior Clerk / Typist	Development Services Department	3/8/2016
32	Lindsay, David	IT Department	County of San Diego	3/8/2016
33	LoMedico, Stacey	Assistant Chief Operating Officer		4/11/2016
34	Lowe, Elyse	Deputy Director	Development Services Department	3/8/2016
35	Luke, Jesse	Information Systems Analyst	Park & Recreation	3/7/2016
36	Martinez, Linda	Sr. Management Analyst	Development Services Department	3/8/2016
37	McGriff, Caryn	Deputy Director	Public Works	3/8/2016
38	Munoz, Monica	Sr. Public Info Officer	Communications Department	3/8/2016
39	Myers, Jim	Deputy Director	Development Services Department	3/9/2016
40	Nabong, James	Sr. Civil Engineer	Transportation & Storm Water	4/11/2016
41	Prasouvo, Cindy	Information Services Administrator	Environmental Services Department	1/14/2016, 3/9/2016
42	Reyes, Arnie	Customer Service Manager	Environmental Services Department	1/14/2016, 3/9/2016
43	Sanchez, Margo	PMO Manager	Department of IT	3/8/2016, 4/11/2016
44	Skiffington, Carina	Public Works Dispatch Supervisor	Transportation & Storm Water	1/14/2016, 4/12/2016
45	Sokolowski, Michelle	Program Manager	Development Services Department	3/8/2016
46	Stone, Bonnie	Deputy Director	City Clerk	3/9/2016
47	Swanson, Lee	Public Information Officer	Fire-Rescue	4/12/2016
48	Tu, Huy	Information Systems Analyst	Transportation & Storm Water	4/12/2016
49	Udrys, Almis	Director	Performance & Analytics	4/11/2016, 3/8/2016, 3/9/2016
50	Villa, Ron	Deputy Chief Operating Officer	Internal Operations	4/11/2016
51	Vogl, Michael	Deputy Director	Public Utilities	1/14/2016, 4/11/2016
52	von Kalinowski, Judy	Deputy Chief Operating Officer	Human Resources	4/11/2016
53	Witzel, Lori	Director	Council Administration	3/10/2016
54	Zimmerman, Shelley	Chief	Police	4/11/2016

Customer Contact Point Verification Survey

Performance & Analytics is developing a roadmap for a customer service platform involving a Customer Relationship Management (CRM) system.

In order to inform the initial planning efforts, we need to verify information about Customer Contact Points throughout the City.

Please review and verify the information below (in **bold**).

Please fill in the blanks:

- If providing data, please indicate the source.
- If providing an estimate, please indicate that it is an estimate.
- Utilize "n/a" or "unknown" as needed.

If you have any questions, please contact: Alex Hempton, 311 Project Coordinator, at ahempton@sandiego.gov / (619) 236-6898. **Please reply no later than 5 p.m., Thursday, March 3, 2016.** Thank you.

Record Number: *«Record_Number»*

A. General Information

Department: **«Department»**
Contact Point: **«Center_Name»**
Contact Point Supervisor: **«Center_Contact_Name»**
Phone Number (public): **«Phone_Number»**
Hours of Operation: **«Hours_of_Operation»**
Email Address (public): **«Email_Address»**

A-1. What is the monthly customer contact volume received by communication channel?

Channel	Monthly Volume	Average Time Spent Per Inquiry/Request
Phone Calls	«Call_Volume_Monthly»	«Call_Ave_Time_Spent»
Email/Web Requests	«Email_Monthly_Volume»	«Email_Ave_Time»
Walk-ins	«Walkins_Monthly_Volume»	«Walkins_Ave_Time»
Social Media	«Social_Monthly_Volume»	«Social_Ave_Time»
Other, specify: «Other_Definition»	«Other_Monthly_Volume»	«Other_Ave_Time»

A-2. What concerns do you have about a Customer Relationship Management (CRM) system? «Concerns_with_a_CRM»

A-3. What benefits could you see a CRM system potentially offering for your contact point? «Benefits_with_a_CRM»

A-4. What challenges have you observed or experienced in getting a customer inquiry to the correct individual who is able to get a question/inquiry answered, addressed, or resolved? «Challenges_Observed_Experienced_to_Resol»

B. Contact Handling

B-1. How many FTE (full time equivalent) employees are involved with handling customer contacts for this contact point? (Example: If one employee spends half their time handling customer contacts, enter 0.50) «Customer_Contact_FTE»

B-2. Do you have a system to track and monitor service and information requests? If so, what is the system/tool/application?
«CRM_Tools»

B-3. What percent of customer contacts are… (should equal 100%)

a. Information Only: «Contact_Info_Only_Percent»%
b. Service Request or Work Order: «Contact_SR_WO_Percent»%

B-4. What are the peak hours of customer contact?
«Peak_Intake_Hours»

B-5. Is there a peak season for customer contacts? «Peak_Season»

C. Knowledge Management

C-1. Does your contact point have standard responses to frequently asked questions (FAQ)? (Y/N) «Standard_FAQ»

C-2. Are the FAQ online, in a printed manual or notebook, or a combination? «FAQ_Online_Manual_Notebook_Combo»

C-3. What are the 3 most common inquiries *from other departments* that are not able to be answered by the contact point?
«Int_Inq_No_Answer_by_CC»

C-4. Please estimate the percent of public inquiries for which your contact point does not have the resources/technology available to answer the question on the initial contact/call:
«Percent_Inquiries_No_Resources_Tech_to_H»%

D. Service Requests – *if applicable*

D-1. What are the top five externally generated service requests?

Number	Service Request	Monthly Volume
1	«RSR_1»	«RSR_1_Monthly_Volume»
2	«RSR_2»	«RSR_2_Monthly_Volume»
3	«RSR_3»	«RSR_3_Monthly_Volume»
4	«RSR_4»	«RSR_4_Monthly_Volume»
5	«RSR_5»	«RSR_5_Monthly_Volume»

D-2. How many service orders are generated monthly?
«SR_WO_Created_Monthly»

E. Phone Call Specific Questions

E-1. How are after-hours calls handled? (Voicemail? Interactive Voice Response (IVR)?) «After_Hour_Calls»

E-2. How many calls are received during afterhours?
«After_Hours_Number_of_Calls»

E-3. How are call-backs handled?
«After_Hours_How_Callbacks_Handled»

E-4. Calls Transferred Out - What percent of calls are transferred to another department because the question or issue is not related to the department that answered the call? «Percent_Calls_Trans_Out»

E-5. Calls Transferred In - What percent of calls received are transferred from another department to your department because the question/issue is not related to the department that answered the call?
«Percent_Calls_Trans_In»

E-6. One Call Close - What percent of calls are resolved during the first call with no need to call back? «Percent_Calls_One_Call_Close»

E-7. Abandonment Rate % - What percent of calls are hung up by the caller prior to being answered and/or hung up after the call is answered, but the caller is immediately put on hold?
«Percent_Abandonment_Rate»

E-8. Average Talk Time (inbound call) (mins/secs): «Ave_Talk_Time»

E-9. Average After Call Work (ACW) (secs): (ACW is measured from the time the caller hangs up to the moment the call-taker has finished documenting the call and is ready to take another call.)
«Ave_After_Call_Work»

Edit this form

CxSD Survey

CxSD stands for Customer Experience Service Delivery - San Diego. CxSD is about enhancing the customer experience and improving how we deliver services.

Performance & Analytics is developing an implementation plan for a customer service platform, utilizing 311 as a framework, and involving a Customer Relationship Management (CRM) system.

To inform the planning process, please complete this one-page survey by February 26, 2016. Thank you.

If you have any questions, please contact Alex Hempton, 311 Project Coordinator, at ahempton@sandiego.gov / (619) 236-6898.

* Required

First Name *

Last Name *

Title *

Department or Area of Responsibility *

What are your biggest concerns and challenges communicating with residents?

What would you like a 311-style customer service platform to accomplish?

What would you like us to consider as we develop the roadmap?

What challenges/risks do you envision in the establishment of a 311-like system?

If you are a department director, please designate a point of contact for your department with regard to this project (i.e. may involve periodic meetings, or assisting us with information gathering/sharing, but we will do our best to minimize disruption to

day-to-day activities).

Additional comments

Optional

Submit

Never submit passwords through Google Forms.

100%: You made it.