

CRM

The following information is an overview of a new software system the City will be implementing over the coming months. The purpose of this system is to equip the City with the ability to track/manage customer requests along with a number of internal requests (i.e. IT HelpDesk and Building Maintenance). This software solution is known as citizen request management (CRM).

WHAT IS CRM?

CRM allows customers (internal or external) to make a request/inquiry online or over the phone. After a request is placed within the CRM program, both staff and the citizen have the ability to track the request. The party making a request receives an automated confirmation email. Requests are automatically routed to the appropriate staff person. If a request is not filled within a specified time period, staff is notified/reminded. CRM also includes the ability to list FAQs/Answers along with customer feedback surveys. CRM provides customers with the ability to contact the City and access FAQs/answers 24/7. Finally, CRM allows requests to be tagged with a location, pictures and attachments (documents).

WHAT ARE THE BENEFITS OF CRM?

CRM benefits citizens by providing transparency, ease-of-mind and professional customer service. CRM benefits the City by increasing efficiencies, increasing the quality of customer service provided by the City and by providing a method to better quantify/manage services provided by the City.

BACKGROUND, WHY IS THE CITY PURSUING CRM?

As part of the 2012 City Council Strategic planning process, pursuing efficiencies and improving customer service through the use of technology was identified as a priority. Staff and Council discussed the potential use of Citizen Request Management (CRM) software as a solution. The City Council voted in late June to purchase CRM services from a company known as GovQA.

HOW DOES CRM WORK?

CRM is a software solution that City accesses remotely. Meaning, the software actually runs off an external server (i.e. a computer in Chicago). City employees are granted log in IDs/passwords (similar to Laserfiche/agenda quick). Employees have the ability to view the system on the back end (i.e. view the status of requests, respond to requests, run reports, add attachments, develop FAQs, etc.).

Citizens (along with employees) can use CRM via a portal located on the City website. This portal is where a citizen can submit/track a request and view FAQ/Answers. Minnetonka is a good example:

http://mygovhelpadmin.us/MINNETONKAMN/_cs/SupportHome.aspx