

Citizen Relationship Management

Citizen Relationship Management (CRM) is a system the City uses to manage its interactions with citizens, vendors, and local businesses. It organizes, automates, and centralizes information in such a way that departments can decrease their clutter, their response times, and maybe even some of their stress.

The Right Tools

What does that mean though? For Grand Rapids CRM means a central place to store and access contact information, notify employees of items, and look through a library of procedures. 311 is currently the largest user of CRM, but many other departments could use CRM tools to become more productive. The purpose of this document is to illustrate some of the important features of CRM, as well as give you a better idea of how your department can take advantage of them.

This document will go over six different aspects of CRM:

- Information - The knowledge base
- Interaction - Contact management
- Automation - Workflow automation
- Perception - Centralized Dashboards
- Integration - Use of other programs



Information

The knowledge base is one of the most used features of the CRM system. Departments can create simplified procedure manuals, articles, and scripts which 311 uses in their customer service efforts. These articles could be a listing of polling stations, or something more complicated like identifying the steps needed to guide a new contract through an approval process. The knowledge base is powerful enough to link to webpages, images, or even other knowledge base articles.

For example a knowledge base could be created for the Attorney's Department. It could feature articles about who is responsible for a specific departmental function, as well as listings of courts and the specific functions that they each serve. There could be links to other articles which have specific information about those courts, or a link to a maps of their locations.

It's important to realize that the knowledge base is more than just an FAQ; It would be possible to build on what 311 has already done and create a CRM knowledge base for individual departments. These knowledge bases could then be used as a central repository for general departmental knowledge, or for the quick lookup of specific procedures and information. Such knowledge bases could give every person within a department the same general level of knowledge, as well as a single place to go when they need questions answered.

A knowledge base could be used as a quick reference for simple information, as well as a centralized location to find specific procedures.

Articles	Search Results
<input type="checkbox"/>	Title ▲
<input type="checkbox"/>	61ST DISTRICT COURT - Civil Cases
<input type="checkbox"/>	61st DISTRICT COURT - Payment for Criminal, Traffic & Pa...
<input type="checkbox"/>	Amtrak
<input type="checkbox"/>	ASSESSOR - Assessment and tax discrepancies
<input type="checkbox"/>	ASSESSOR - Assessment Appeal
<input type="checkbox"/>	ASSESSOR - Building count discrepancies
<input type="checkbox"/>	ASSESSOR - Customer plans on making alterations to thei...

Articles	Description
	people calling to ask about owner/taxpayer information, mailing address, sale price, sale date, assess...
	customer is calling wondering why their property tax (Taxable Value) has gone up and how their prop...
	caller received a letter requesting more information about their homeowner's PRE
	how do I get a list of properties from the Assessor's Office?
	customer has received a form or affidavit that was returned to them for corrections or completion...
	how do I apply for the disabled veteran's exemption? Or What is the disabled veteran's exemption?
	customer is calling requesting how to appeal their assessment and/or complete the Assessor's Review
	when I still receive a City of Grand Rapids services guide?
	link to Municode (all Grand Rapids city ordinances, codes and regulations), city ordinance, ordinances
	caller wants to know how they can pay an invoice, or has questions regarding the balance owing
	1. What is it?
	caller is attempting to get information that 311 was not designed to deliver
	an employee or visitor at City Hall would like to know of a location where they can breast feed in the
	caller wants to be transferred to or wants a phone number/email for a city employee.
	caller is asking if a City Hall office will be open on a specific holiday.
	resident would like to know how to get Grand Rapids City logo items, or how to order from City stor
	citizens can use mobile devices (apps/twitter) to report issues
	customer is calling to report that they recieved excellent service from a city employee
	caller would like to contact the Head of the Enterprise Services or information on the enterprise fund
	caller is inquiring about free community wi-fi internet service in the City of Grand Rapids
	all Moon Schedule
	resident would like the TTY/ TDD telephone service number
	caller is inquiring about the new GoSite located at the Grand Rapids Art Museum

Article
KBA-02793-K5T1Q7

General

Title * Subject *

Key Words

Description *

Service Request Link

Knowledge Base Responses (External)

61ST DISTRICT COURT - JURY DUTY
KBA-02793-K5T1Q7

Knowledge Base Article

JURY DUTY – general information

Disclaimer: The information provided only applies to the 61st District Court process. Other courts may proceed in a different manner.

[WHERE TO REPORT – WHERE TO PARK – EXCUSAL FROM SERVICE/REQUIREMENTS – TIME – COMPENSATION –](#)

A well written knowledge base article

A knowledge base in the wild

Interaction

As you already read Citizen Relationship Management is a way of managing interactions. The knowledge base manages information & procedures, but the contact management aspect of CRM can also manage the information about the citizens & vendors & groups who interact with the City.

CRM can store the phone number, email address, and house address, but contact management is so much more than just a phonebook. It can consolidate and centralize every aspect of communication with the City. Every phone call, every email, notes about what was discussed, and even notes about what should be done next. Contact management can drastically reduce the time and energy that goes into dealing with outside parties.

Like we said though, this is more than just a phone book. Think bigger than email. Think more important than phone numbers. Think of their refuse collection day, think of the requests they made to public services. Think of alerting residents of a specific street to construction before it happens. Think self-service; having a person find the information themselves. Think of a history of interactions, and a central place to see if their problems have been solved.

With CRM the City is able to evolve the way it interacts with its citizens. Contact management allows for all the interactions between the City and its citizens to be laid out in a clear, readable, and up-to-date manner. The goal of CRM is to centralize information, and contact management is a big piece of that goal.

The screenshot displays a CRM interface with a sidebar on the left and a main content area on the right. The sidebar includes a search filter set to 'All' and a list of activities such as 'Email to the Manager - Help!', 'Park Request for Service', 'Schedule an appointment for main...', and 'Thank you so much!'. Below the list, it states 'All previous interactions can be reviewed'. The main content area shows a contact profile for 'John Lastnamé' with the following details:

- General:** Search by Address: 300 Monroe, 300 MONROE AVE NW. Fields include First Name (John), Last Name / Business Name (Lastnamé), Home Phone ((616) 456-7890), Street 1 (300 MONROE AVE NW), City (GRAND RAPIDS), State/Province (MI), ZIP/Postal Code (49503), Business Phone, and Mobile Phone.
- Ward & Neighborhood Information:** Parcel Number (41-13-26-227-015), Neighborhood (Downtown), Ward (2), and Government Unit (City of Grand Rapids).

Contact information is centrally stored

Automation

One of the most powerful features of CRM is the ability to create and use customized workflows. What is a workflow? A workflow is simply a way of automating tasks; primarily by forwarding information, guiding, and alerting. Workflows can guide employees through a process, alert users for approval, reminding employees to review items, or any number of other things.

If, for example, a vendor document needed approval a workflow could automatically forward the file to the appropriate people to review. After they had approved the document the workflow could then alert the original person, and a separate workflow could guide them through the rest of the procedure.

Right now, some departments use a work queue to visualize both the number, the stage of completion, and the priority of any their work items. Workflows can track these items, automatically alert predefined groups, keep the item accessible, and make sure they are being resolved.

Workflows reduce the time and energy spent on the "What's next?" thought process. They eliminate guesswork, and make sure the proper process is followed throughout. Furthermore, workflows can eliminate some of tedious parts of common tasks, and speed up the time it takes to respond and resolve work items.

Queue Items All Items ▾

Queue: WaterBO ▾

	Title	Entered Queue ▾	Type
<input type="checkbox"/>	2128623	11/3/2014 12:22 PM	WaterBO
<input type="checkbox"/>	2112945	11/3/2014 10:01 AM	WaterBO
<input type="checkbox"/>	2075928	10/30/2014 5:01 PM	WaterBO
		10/30/2014 2:15 PM	WaterBO
		10/30/2014 11:41 AM	WaterBO
		10/28/2014 3:26 PM	WaterBO
		10/28/2014 2:09 PM	WaterBO
		10/24/2014 2:46 PM	WaterBO
		10/23/2014 10:34 AM	WaterBO
		10/21/2014 10:52 AM	WaterBO
		10/20/2014 12:57 PM	WaterBO
		10/20/2014 12:27 PM	WaterBO
		10/13/2014 12:02 PM	WaterBO
		10/10/2014 4:01 PM	WaterBO
		10/9/2014 8:45 AM	WaterBO
		10/1/2014 1:00 PM	WaterBO
		9/29/2014 8:20 AM	WaterBO
		9/18/2014 1:27 PM	WaterBO
		9/16/2014 11:07 AM	WaterBO

Example of a work queue

General Administration Notes

Hide Process Properties

Process Name * Test Scope of Business Rule Entity Test Entity A

Activate As Process Category Workflow

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Log Retention

Keep logs for workflow jobs that encountered errors

Options for Automatic Processes

Scope Organization

Start when: After Record is created

After Record status changes

Record is assigned

Record fields change Select

Before Record is deleted

Execute as:

The owner of the workflow

The user who made changes to the record

Add Step | Insert | Delete this step.

Type a step description here.

Update: Test Entity A Set Properties

A workflow being born

Perception

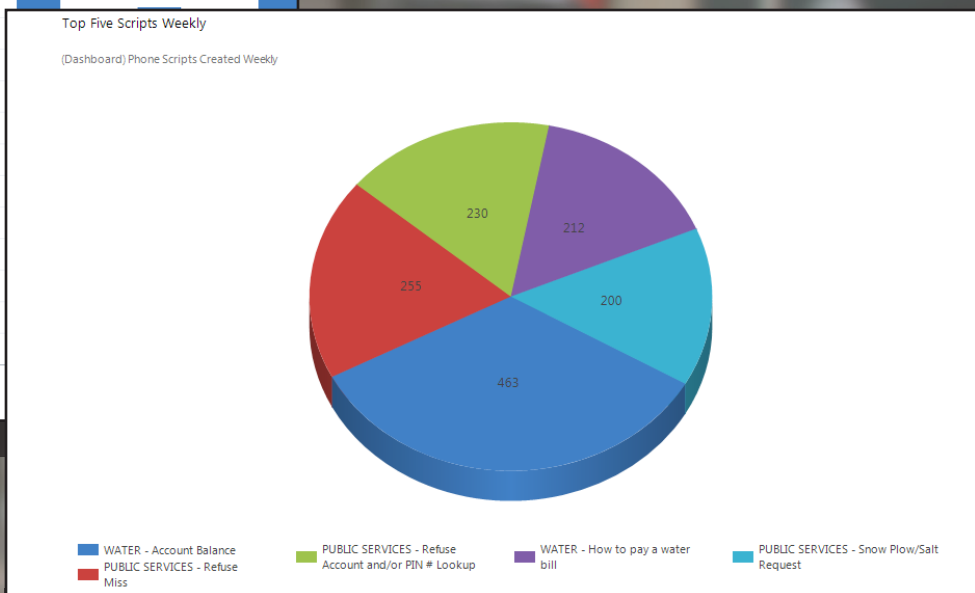
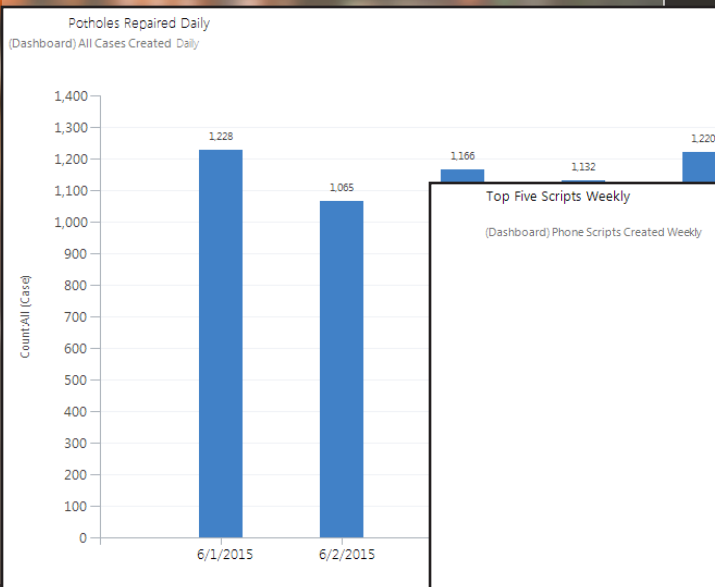
As you might have gathered already, one of the main goals of CRM is the centralization and organization of information. Keeping procedures, contacts, schedules, and treasure maps all within a single location.

CRM also uses colorful dashboards to help keep information viewable in a single centralized page. Dashboards can help users track a diverse array of information which can then be displayed within easy-to-understand graphs.

These graphs could represent things such as what sort of information you're giving to citizens, what work has been done by road crews, how long it took them to finish the work, or even what topics citizens might be calling about. Centralized that information allows the City to better focus resources, predict occurrences, or identify trends.

Right now 311 uses dashboards in various ways to track its day-to-day operations. At any given moment, without having to run a report, 311 is able to answer questions such as how many calls were received, the most frequent question answered that day, or how long it took to resolve a call.

Departments might find new uses for dashboards as they integrate CRM into their tools. For example, a department might create a dashboard which displays all of the work items that they received over a set period of time. With one glance a department head could see which work items were new, open, or closed. This would reduce the need to constantly run reports, while still keeping informed on the work being done.



Dashboards can show work done

or what questions are being asked

Integration

Grand Rapids uses Microsoft Dynamics as its primary CRM tool, and Dynamics is able to integrate with some of the other tools you already use. A simple example would be using Microsoft Lync or Outlook to directly connect with a contact. An email could be sent or a call connected without leaving the Dynamics window.

CRM also makes it possible to work within one program. Microsoft Dynamics allows you to access and edit Excel spreadsheets without opening another window. Say your department uses a shared spreadsheet to keep a list of vendor accounts; Dynamics would let you open it, add a new vendor, and save it without ever needing to open a new window. CRM, in conjunction with SharePoint, can also take existing Office driven processes to the next level by opening the door to multiple users, separate permissions, versioning, and workflows.

CRM can also be used as a scheduling tool and calendar, a central department-wide place to schedule meetings, or look up availability. The Fire department recently adapted a CRM calendar for use when scheduling inspections for citizens. When the public calls 311 to schedule the inspection an agent is able to quickly view open appointment slots on their departmental calendar without needing to leave the window.

CRM can integrate some of your non-Microsoft tools as well. Solutions are being analyzed to integrate programs such as Accela, Cayenta, GIS, and BS&A directly into CRM. This would allow you to leverage CRM's centralization to get everything done without needing to open a new window.



The screenshot shows the 'Configure Source' window in Microsoft Dynamics CRM. It displays a table of XML components for a 'new_graffitirequest' entity. The table has columns for Link, Ref, Field Name, and Type/Length. A 'Data Link' button is visible on the right side of the window.

Link	Ref	Field Name	Type/Length
S26		new_longitude	<new_graffitirequest> float
S27		new_name	<new_graffitirequest> nchar
S28		new_phonenumber	<new_graffitirequest> nchar
S29		new_priority	<new_graffitirequest> integer
S30		new_priorityname	<new_graffitirequest> nchar
S31		new_regardingcontact	<new_graffitirequest> nchar
S32		new_regardingcontactname	<new_graffitirequest> nchar
S33		new_regardingcontactid	<new_graffitirequest> integer
S34		new_regardinglead	<new_graffitirequest> nchar

The screenshot shows a 'Schedule' interface for a departmental calendar. It includes a search bar for 'Appointment Street Address' with the value '300 MONROE AVE NW'. Below the search bar, there are navigation buttons for 'today', 'month', 'week', and 'day'. The main area displays a calendar for March 2015 with appointment slots for various times (8:30a, 9:15a, 10a, 10:45a) on different days.

Appointment Street Address: 300 MONROE AVE NW

Search by Address: 300 MONROE AVE NW - GRFS 3

March 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
23	24	25	26	27	28	1
8:30a P-3 RSP 9:15a P-3 RSP 10a P-3 RSP 10:45a P-3 RSP		8:30a P-3 RSP 9:15a P-3 RSP 10a P-3 RSP 10:45a P-3 RSP				
2	3	4	5	6	7	8
					9a P-3 RSP 9:45a P-3 RSP 10:30a P-3 RSP 11:15a P-3 RSP	
9	10	11	12	13	14	15
		8:30a P-3 RSP 9:15a P-3 RSP 10a P-3 RSP 10:45a P-3 RSP				

The screenshot shows a configuration table with columns for Step Field, Overwrite, and Formula. It lists various data links and formulas used in the system.

Step Field	Overwrite	Formula
iceredData_ProblemAddress	S25	
iceredData_ProblemSid	"5008"	
iceredData_CustomerCalls_Emu	"155 GRAFFITI"	
iceredData_CustomerCalls_Cus	S20	
iceredData_CustomerCalls_Cur	S70	
iceredData_CustomerCalls_Cus	S63	
iceredData_CustomerCalls_Cus	S80	
iceredData_CustomerCalls_Cus	S75	
iceredData_CustomerCalls_Cus	"CRH"	
iceredData_CustomerCalls_Firs	S21	
iceredData_CustomerCalls_Las	S23	
iceredData_CustomerCalls_Hor	S28	
iceredData_Details	S25	

Information can be imported

A departmental calendar