Citizen Relationship Management

The Right Tools

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.

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

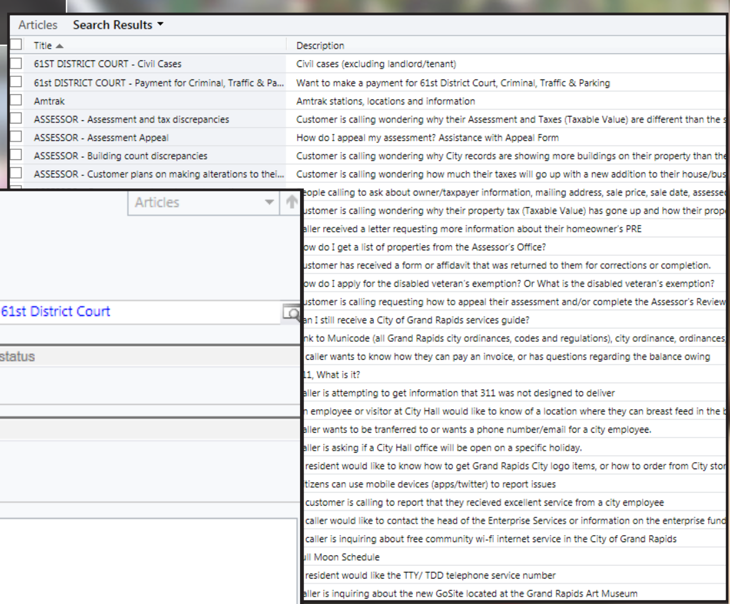
Information

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.

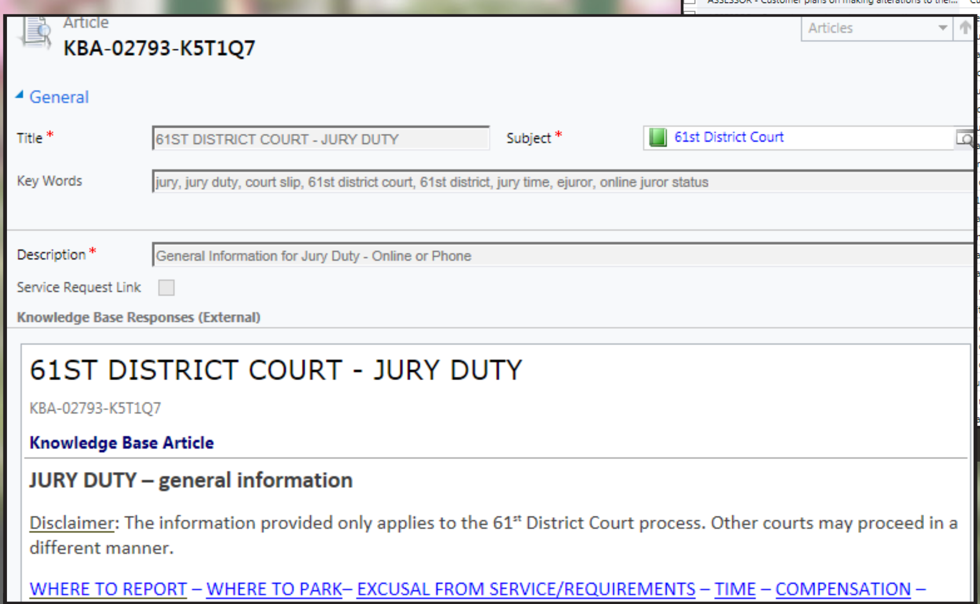
It's important to realize that the knowledge base is more than just an FAQ; It would be possible to build on what 311 has already done and create a CRM knowledge base for individual departments. These knowledge bases could then be used as a central repository for general departmental knowledge, or for 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

Title	Description
61ST DISTRICT COURT - Civil Cases	Civil cases (excluding landlord/tenant)
61st DISTRICT COURT - Payment for Criminal, Traffic & Pa...	Want to make a payment for 61st District Court, Criminal, Traffic & Parking
Amtrak	Amtrak stations, locations and information
ASSESSOR - Assessment and tax discrepancies	Customer is calling wondering why their Assessment and Taxes (Taxable Value) are different than the s
ASSESSOR - Assessment Appeal	How do I appeal my assessment? Assistance with Appeal Form
ASSESSOR - Building count discrepancies	Customer is calling wondering why City records are showing more buildings on their property than the
ASSESSOR - Customer plans on making alterations to thei...	Customer is calling wondering how much their taxes will go up with a new addition to their house/bus
	eople calling to ask about owner/taxpayer information, mailing address, sale price, sale date, assesse
	ustomer is calling wondering why their property tax (Taxable Value) has gone up and how their prop
	aller received a letter requesting more information about their homeowner's PRE
	ow do I get a list of properties from the Assessor's Office?
	ustomer has received a form or affidavit that was returned to them for corrections or completion.
	ow do I apply for the disabled veteran's exemption? Or What is the disabled veteran's exemption?
	ustomer is calling requesting how to appeal their assessment and/or complete the Assessor's Review
	an I still receive a City of Grand Rapids services guide?
	nk 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
	11, What is it?
	aller is attempting to get information that 311 was not designed to deliver
	n employee or visitor at City Hall would like to know of a location where they can breast feed in the b
	aller wants to be tranferred to or wants a phone number/email for a city employee.
	aller 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
	itizens 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
	ull Moon Schedule
	resident would like the TTY/ TDD telephone service number
	aller is inquiring about the new GoSite located at the Grand Rapids Art Museum

A knowledge base in the wild


Article
KBA-02793-K5T1Q7

Articles

General

Title * 61ST DISTRICT COURT - JURY DUTY
Subject * 61st District Court

Key Words: jury, jury duty, court slip, 61st district court, 61st district, jury time, ejuror, online juror status

Description * General Information for Jury Duty - Online or Phone

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

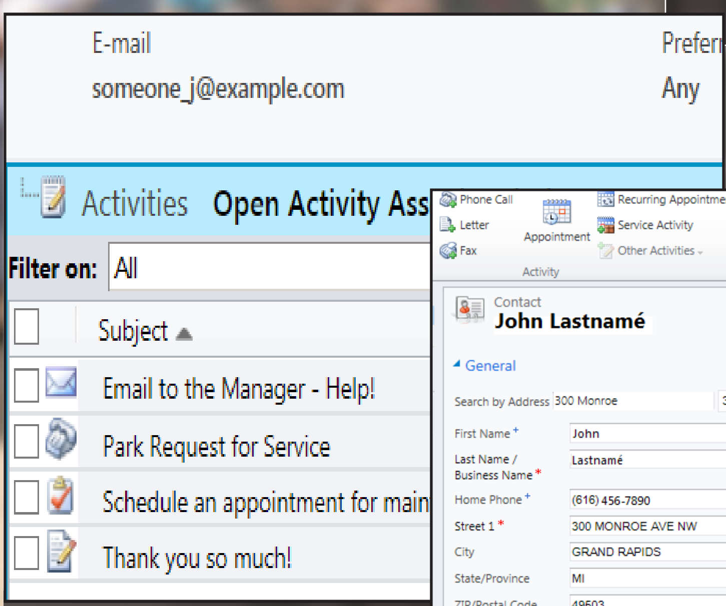
Interaction

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.

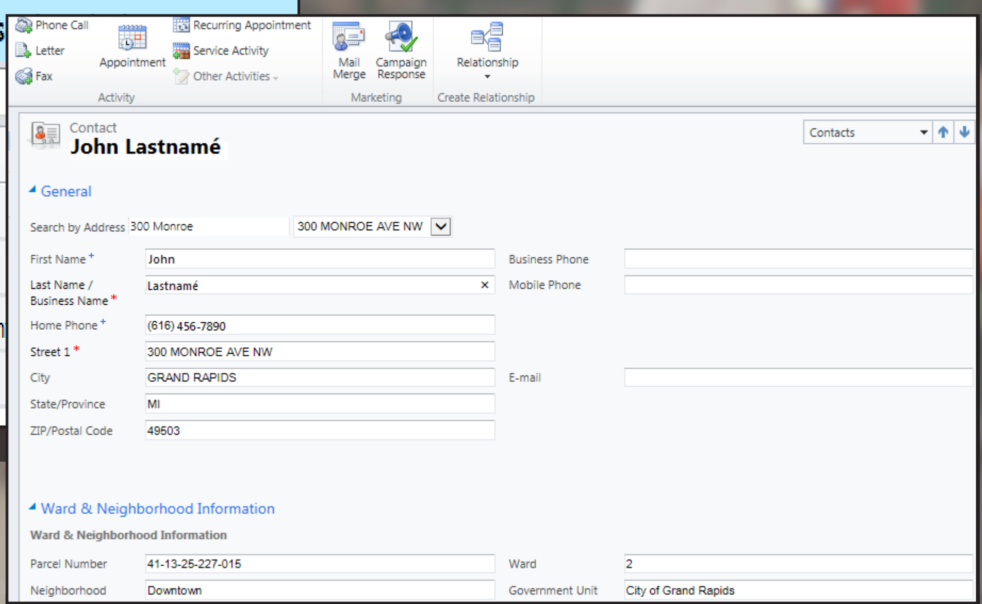
CRM can store the phone number, email address, and house address, but contact management is so much more than just a phonebook. It can consolidate and centralize every aspect of communication with the City. Every phone call, every email, notes about what was discussed, and even notes about what should 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.



All previous interatctions can be reviewed



Contact information is centrally stored

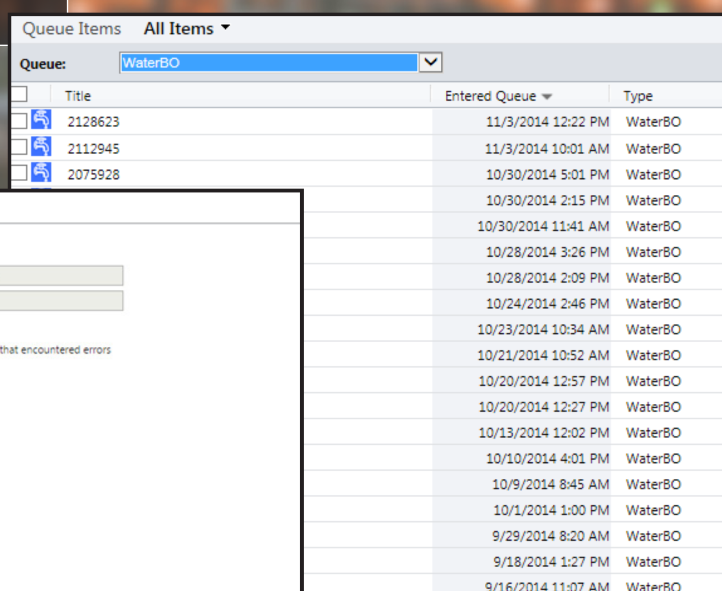
Automation

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.

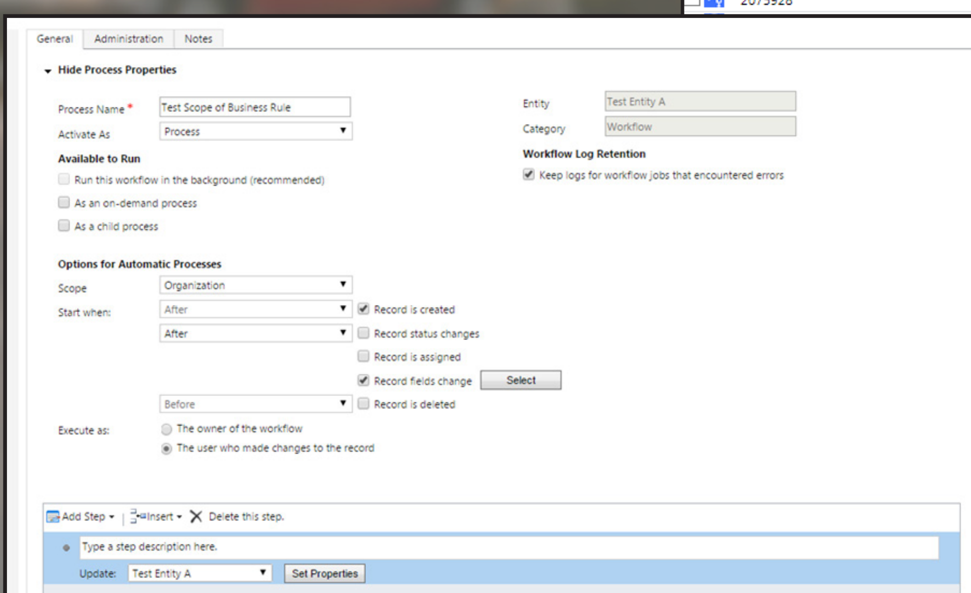
If, for example, a vendor document needed approval a workflow could automatically forward the file to the appropriate people to review. After they had approved the document the workflow could then alert the original person, and a separate workflow could guide them through the rest of the procedure.

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.



Example of a work queue



A workflow being born

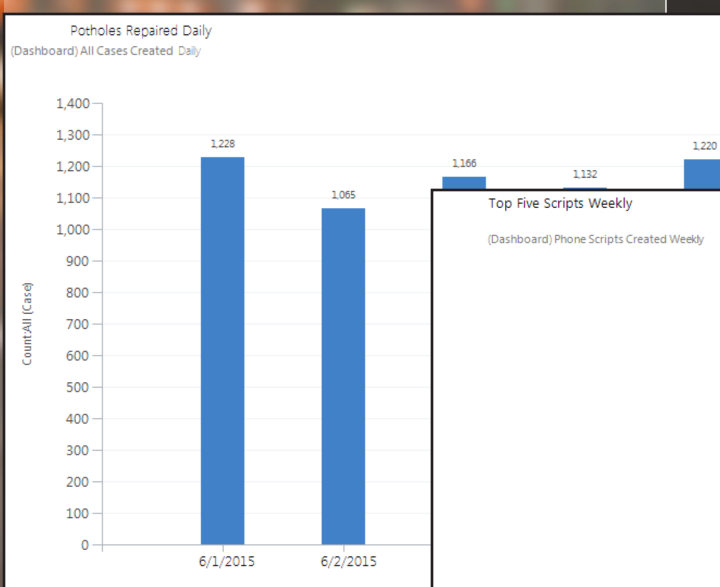
Perception

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.

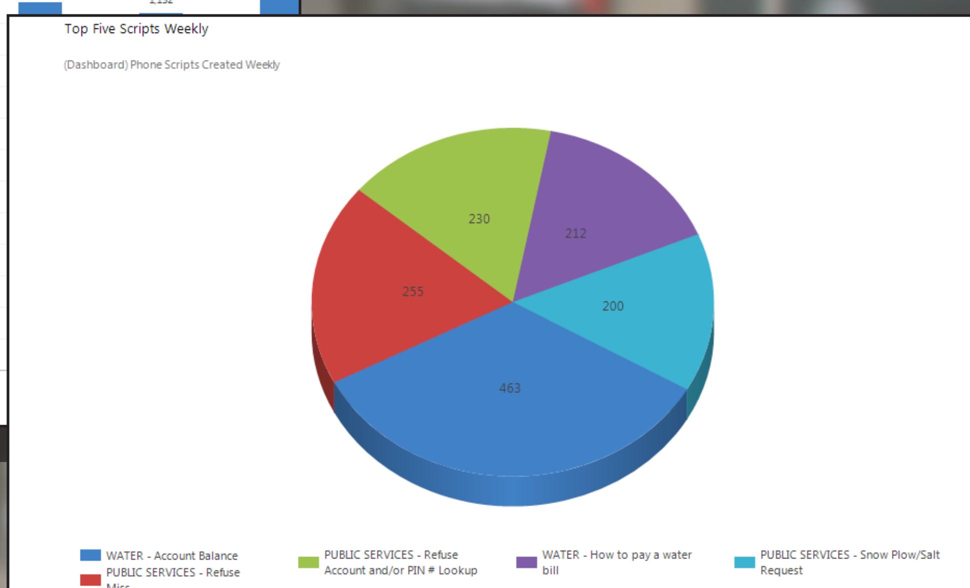
These graphs could represent things such as what sort of information you're giving to citizens, what work has been done by road crews, how long it took them to finish the work, or even what topics citizens might be calling about. Centralized that information allows the City to better focus resources,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

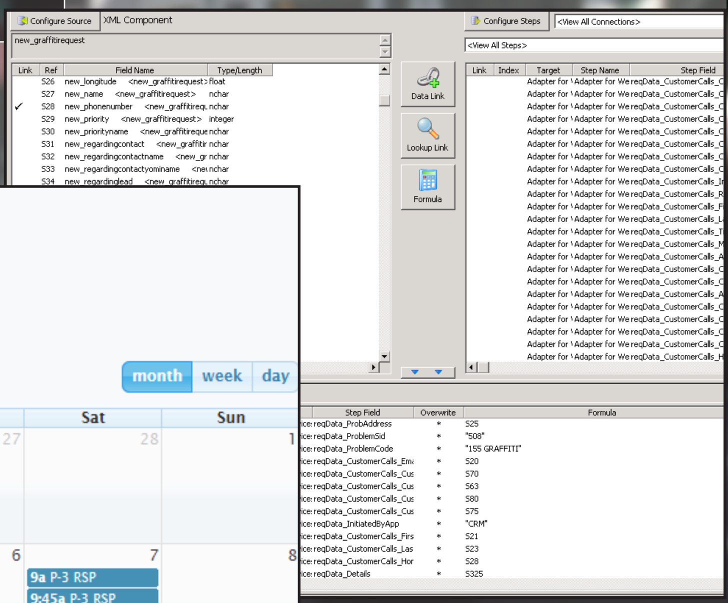
Integration

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.

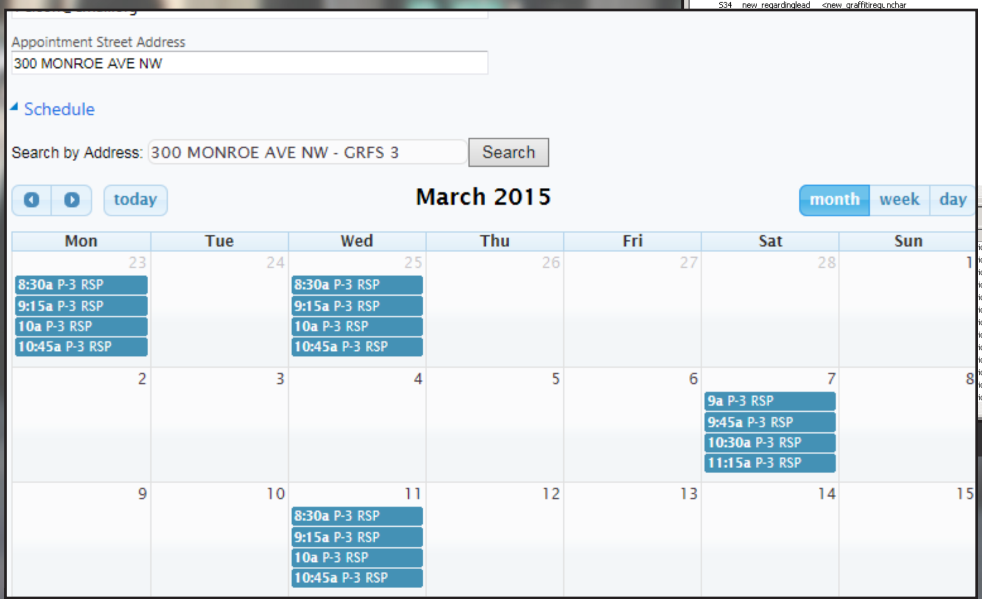
CRM also makes it possible to work within one program. Microsoft Dynamics allows you to access and edit Excel spreadsheets without opening another window. Say your department uses a shared spreadsheet to keep a list of vendor accounts; Dynamics would let you open it, add a new vendor, and save it without 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.



Information can be imported



A departmental calandar