

Memorandum



CITY OF DALLAS

DATE June 16, 2018

TO Honorable Mayor and Members of the City Council

SUBJECT Customer Service Management: 311 System Replacement and Contact Management (Dal-Force)

Summary

Attached is a briefing to be presented on June 20, 2018 regarding the replacement of the City's service request software and the use of contact management software in the Mayor & Council Office.

Background

The City is currently implementing Salesforce Customer Request Management (CRM) software for service request input and management for services that include, but are not limited to Water, Courts, DPD Auto Pound, Dallas Animal Services, Code Compliance, Public Works and Transportation. The CRM System documents, routes and tracks approximately 400,000 service requests annually for 311 non-emergency services received by phone, online and via mobile application. Implementation began on November 13, 2017 and staff anticipate a go-live date in August 2018.

The Mayor & Council Office uses Salesforce's contact management module (Dal-Force) to facilitate tracking of constituent concerns, increase constituent satisfaction through transparency and collaboration, and capture sentiment on policy issues. The presentation will provide an update on the CRM implementation and how the two Salesforce modules will interface.

Please contact me if you have any questions or require any additional information.

A handwritten signature in blue ink, appearing to read 'Nadia Chandler-Hardy'.

Nadia Chandler-Hardy
Chief of Community Services

c: T.C. Broadnax, City Manager
Larry Casto, City Attorney
Craig D. Kinton, City Auditor
Biliera Johnson, City Secretary
Daniel F. Solis, Administrative Judge
Kimberly Bizar Tolbert, Chief of Staff to the City Manager
Majed A. Al-Ghafry, Assistant City Manager

Jo M. (Jody) Puckett, Assistant City Manager (Interim)
Jon Fortune, Assistant City Manager
Joey Zapata, Assistant City Manager
M. Elizabeth Reich, Chief Financial Officer
Raquel Favela, Chief of Economic Development & Neighborhood Services
Theresa O'Donnell, Chief of Resilience
Directors and Assistant Directors

Customer Service Management: 311 System Replacement and Contact Management (Dal-Force)

City Council Briefing

June 20, 2018

Margaret Wright, Managing Director
311 Customer Service Center

William Finch, CIO
Communication & Information
Services



City of Dallas

Presentation Overview

- Service Request Software Background/History
- Implementation Progress
- Contact Management (Dal-Force)
- Demo

Background/History

- Service Request Management System = CRM (Customer Request Management)
- Documents, routes and tracks 400,000 service requests annually for 311 non-emergency services received by phone, online, or via app
- Current software (Motorola) in use since 2002

Background/History (cont.)

- 311 Customer Service Center
 - Open 24/7/365
 - Handles over 1 million calls per year (311, Water Customer Service, Court Services, Auto Pound)
 - Dispatches urgent calls for field services for 6 departments
- CRM system administration
 - Configures, routes and reports on 400+ service request types handled by 38 City departments
- GIS mapping of service requests

Salesforce CRM Implementation

- Project kick off 11/13/17
- Steering Committee representation from CMO, CIS, 311, and major user departments (Code, DAS, SAN, PBW, TRN, DWU)
- Project on track for August go-live

Listening to the Customer

- Held 8 focus groups with residents and staff December-January
 - Facilitated by outside vendor
 - Goal: identify current vs. desired customer experience when interacting with 311 (phone, web, app)
- Captured recommendations across six different areas of service request management:
 - Overall improvement
 - Service request generation
 - Service request fulfillment
 - Monitoring progress
 - Escalation
 - Closure

Sample Recommendation

- Google-like search for service request key words
- Mobile users can create & update service request when connectivity is poor; system stores info and submits when connectivity is restored
- Notification through the life of the SR via preferred method: text, email, phone
- Customers can see other submitted service requests in their area
- Fewer clicks to submit service requests on the web

Project Milestones Complete

- Reduced number of existing service request (SR) types
 - Example: Code Compliance reduced from 150 to 80 SR types
 - Combine similar types for easier submittal by residents
- City staff trained on system configuration
- Completed configuration of 240 public-facing SR types in Salesforce

Project Milestones Complete (cont.)

- Created project Sharepoint site for status and information communication across City departments
- Reports:
 - 48 standard reports available
 - Custom reports to be built as-needed
- Dashboards

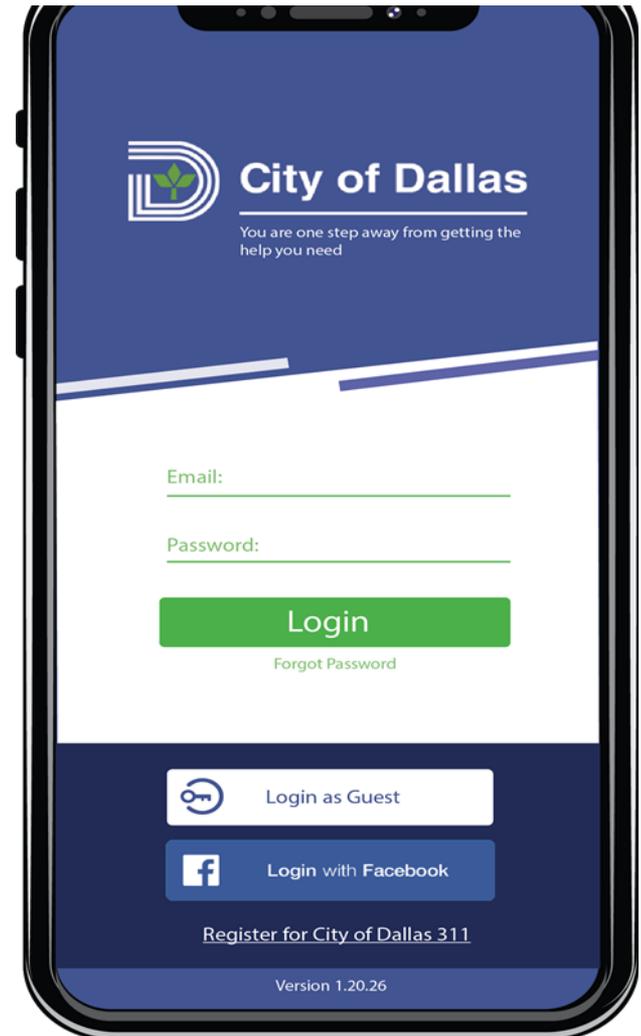
Project Milestones In Progress

- Integrations with other City systems
 - Dal-Force—311 SRs are visible on the Dal-Force contact
 - Animal Services (Chameleon)
 - Code Compliance (POSSE)
 - Active Directory (Network log-in)
 - GIS
 - Socrata/Big Data

Salesforce Test Demo

My Dallas App

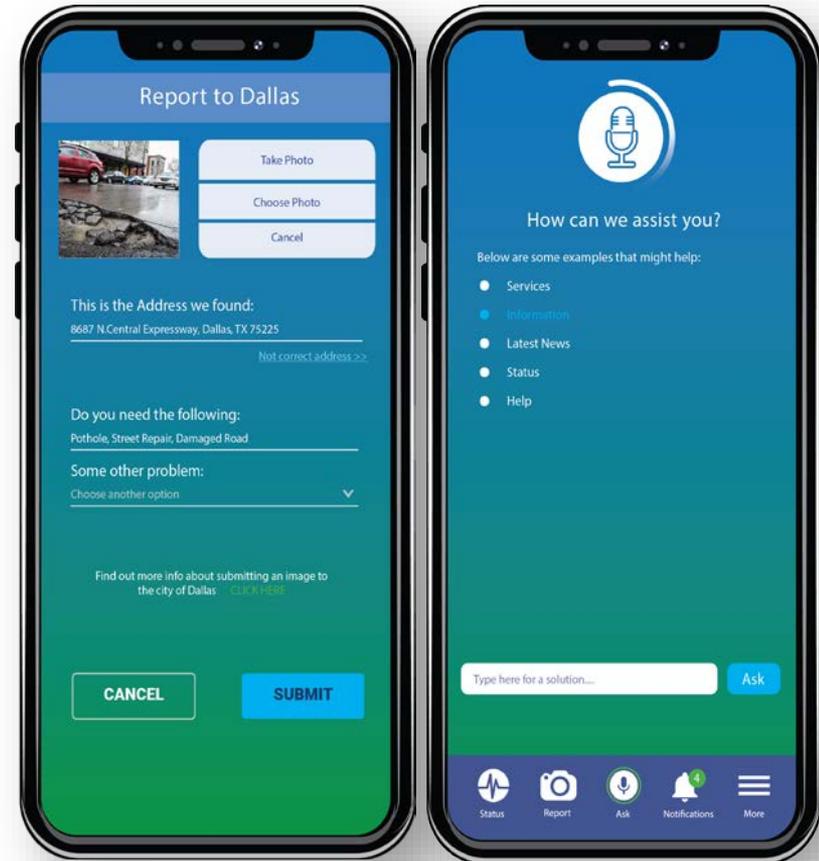
- One App for all City of Dallas Apps
- Zero Code Platform: instant and agile development
- Expose data from different systems in a single mobile user experience
- For the City of Dallas, Mobile Salesforce/311 integration is only the beginning



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Planned Enhancements

- The MyDallas platform will be enhanced to include Artificial Intelligence (AI) to recognize images and to understand natural language voice commands.
- AI will enable the MYDallas app to continually “get smarter and more intelligent” as users and the city interact with the platform.



Contact Management (Dal-Force)

Dal-Force Overview

- Centralized tool to track and manage service requests and connect common issues across districts
- Accelerates response to constituent requests by connecting all City contact points
- Streamlines processing of information across districts and departments

Purpose

- Increases constituent satisfaction through transparency and collaboration
- Able to capture sentiment (For or Against) on policy issues

Background

- Salesforce.com Software-as-a-Service platform
- Web-based and accessible via Internet browser
- Supports smart / mobile devices – anywhere, anytime
- Configured for Mayor and Council staff

Configured for Mayor and Council Office

- Interfaces with new 311 System
- Replaces single-file, clunky spreadsheets of constituent calls and emails
- Tracks contact with constituents across districts, if needed
- Supports greater collaboration of information
- Data can inform policy decisions and performance measures

Configured for Mayor and Council Staff

Centralized tool to track and manage service requests and connect commons issues across districts

Service Requests



Mobile Device Access



Identifies non-311 Common Issues



Feature Exclusive to Dal-Force

Informs Policy Decisions



Training and Next Steps

Two Dal-Force Demos Completed with Council Staff March/April

Dal-Force Constituent Application Ready and Available Now

Finalize District Reports & Dashboards

Verify / Load District Constituents into Dal-Force

Register Participants for Classroom Sessions

New 311 System Launches in August 2018

Staff Recommendation

- Staff recommends introduction of Dal-Force in Council Districts on pilot basis

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