

Memorandum



CITY OF DALLAS

DATE October 12, 2017

TO Honorable Mayor and Members of the City Council

SUBJECT **311 System – Customer Request Management System Replacement**

On Wednesday, October 18, 2017, William Finch, Chief Information Officer of Communication & Information Services and Margaret Wright, Managing Director of the 311 Customer Service Center, will brief the council on the 311 System – Customer Request Management System Replacement.

This briefing will provide information on the proposed service request software, procurement process, visual samples of the software, and the implementation plan. The briefing materials are attached for your review.

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

A handwritten signature in blue ink that reads "M. Elizabeth Reich".

M. Elizabeth Reich
Chief Financial Officer

Attachment

c: T.C. Broadnax, City Manager
Larry Casto, City Attorney
Craig D. Kinton, City Auditor
Billierae Johnson, City Secretary (Interim)
Daniel F. Solis, Administrative Judge
Kimberly Bizer 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
Nadia Chandler Hardy, Chief of Community Services
Raquel Favela, Chief of Economic Development & Neighborhood Services
Theresa O'Donnell, Chief of Resilience
Directors and Assistant Directors

311 System - Customer Request Management System Replacement

**Dallas City Council
October 18, 2017**

**William Finch, CIO
Communication & Information Services**

**Margaret Wright, Managing Director
311 Customer Service Center
City of Dallas**



Presentation Overview

- Background/History
- Procurement Process
- Screen Shots
- Implementation Plan
- Next Steps



Background/History

- Customer Request Management System = CRM System
- 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



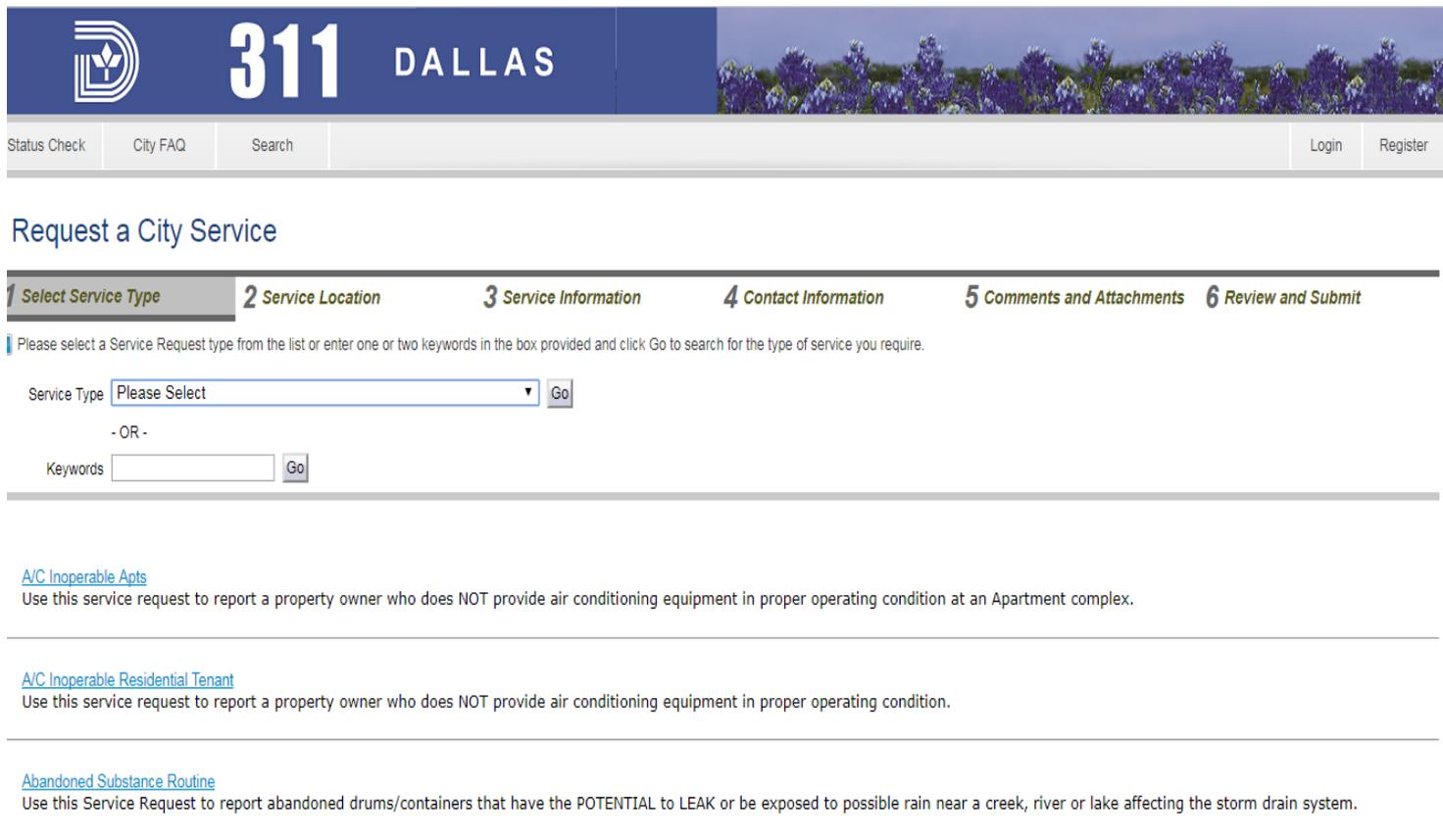
Background/History, cont'd

- 311 Customer Service Center
 - Open 24/7/365
 - Handles over 1 million calls per year (311, Water Customer Service, Court Services)
 - 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

4



Background/History, cont'd



The screenshot shows the 311 Dallas website interface. At the top left is the 311 Dallas logo. Below it are navigation links for 'Status Check', 'City FAQ', and 'Search'. On the right are 'Login' and 'Register' links. The main heading is 'Request a City Service'. Below this is a progress bar with six steps: 1. Select Service Type, 2. Service Location, 3. Service Information, 4. Contact Information, 5. Comments and Attachments, and 6. Review and Submit. Step 1 is currently selected. Below the progress bar is a text instruction: 'Please select a Service Request type from the list or enter one or two keywords in the box provided and click Go to search for the type of service you require.' There are two input options: a dropdown menu for 'Service Type' with 'Please Select' as the current selection, and a 'Go' button; and a text box for 'Keywords' with a 'Go' button. Below these are three service categories, each with a link and a description: 'A/C Inoperable Apts' (reporting property owners who do not provide air conditioning equipment in proper operating condition at an Apartment complex), 'A/C Inoperable Residential Tenant' (reporting property owners who do not provide air conditioning equipment in proper operating condition), and 'Abandoned Substance Routine' (reporting abandoned drums/containers that have the POTENTIAL to LEAK or be exposed to possible rain near a creek, river or lake affecting the storm drain system).

5

Customer Concerns

- Current system is outdated
- Has any work been done on my service request?
- My service request is closed, but I don't see any progress on the problem
- What do you mean, "unable to confirm/locate problem"?
- The mapping function on the mobile app doesn't work

6



Customer Service Goals for New System

- Visibility for customers through the life cycle of service request
- Easier service request creation and management
- Communication about service requests via customer's preferred channel (text, email, online, app, social media)
- Improved visualization of service request activity (dashboards, maps)

7



Procurement Process

- Request For Proposal advertised September 2016
- Notifications sent to
 - 391 vendors
 - 25 chambers of commerce
 - 2 advocacy groups (i.e. DFW Minority Business Council and Women's Business Council-Southwest)
- Fourteen proposals received November 2016

Evaluation Process

- Evaluation committee consisted of employees from the following departments:
 - 311 Customer Service Center
 - Code Compliance
 - Communication and Information Services
 - Office of Budget
 - Sanitation Services
 - Public Works
 - Office of Procurement Services*

*Office of Procurement Services only evaluated the proposed pricing

Evaluation Process, cont'd

- Evaluation Criteria:
 - Cost 30 points
 - Capability and Expertise 15 points
 - Functional match to City Requirements 20 points
 - Technical match to City Requirements 20 points
 - Business Inclusion & Development Plan 15 points
- Fifty-five percent of possible points focused on vendor's capability and how well proposed solution matches City's needs



Evaluation Process, cont'd

- On-site presentations made in March & April 2017 by:
 - Incapsulate/Salesforce
 - IBM/Microsoft
 - NTT Data/Salesforce
 - AST Corporation/Oracle
 - 3Di, Inc.
- Incapsulate and IBM teams were then shortlisted for further consideration and final scores
- Selected vendor team: Incapsulate/Salesforce

11

Salesforce CRM

- Salesforce is ranked as the world's leading cloud-based Customer Service Operation platform
- Salesforce's Software-as-a-Service Government cloud platform is secure, scalable and reliable
- Data stored on the Salesforce platform is replicated to alternate Salesforce data centers in other areas of the U.S. to support the City's business continuity objectives

12



Addressing Customer Pain Points

- Ability to change/transfer a service request type without changing the service request number or closing the original request
- Service Request activity-based notifications
- Dashboards, improved mapping, and reporting
- CRM Cloud Based = always on the most up-to-date version of the software

13



311 Experience

- Incapsulate/Salesforce team implemented conversion from Motorola CRM to Salesforce for Washington, DC 311 and Baltimore 311 (in progress)
- Salesforce CRM also used by Denver, Boston, Orange County, and Indianapolis 311 centers



Screen Shots

- Service Request Input (web and mobile app)
- Dashboard samples



Citizen View 1—Select the Request



City of Dallas

Register Login 

Request Status All Services Questions

 How can we help? 

Get Help With:

- Popular Service Requests**
Substandard Structure 
- Garbage**
Garbage Roll Cart - Commercial, Garbage Roll Cart - Residential, Reside... 
- Health**
Odor Complaint 
- Notifications**
Emergency Notification, General Notification 
- Weed Control**
High Weeds, High Weeds Apts 
- Other**
Substandard Structure - Apt - CCS 

Other:

Substandard Structure - Apt - CCS 
No description available

Citizen View 2—Select Location

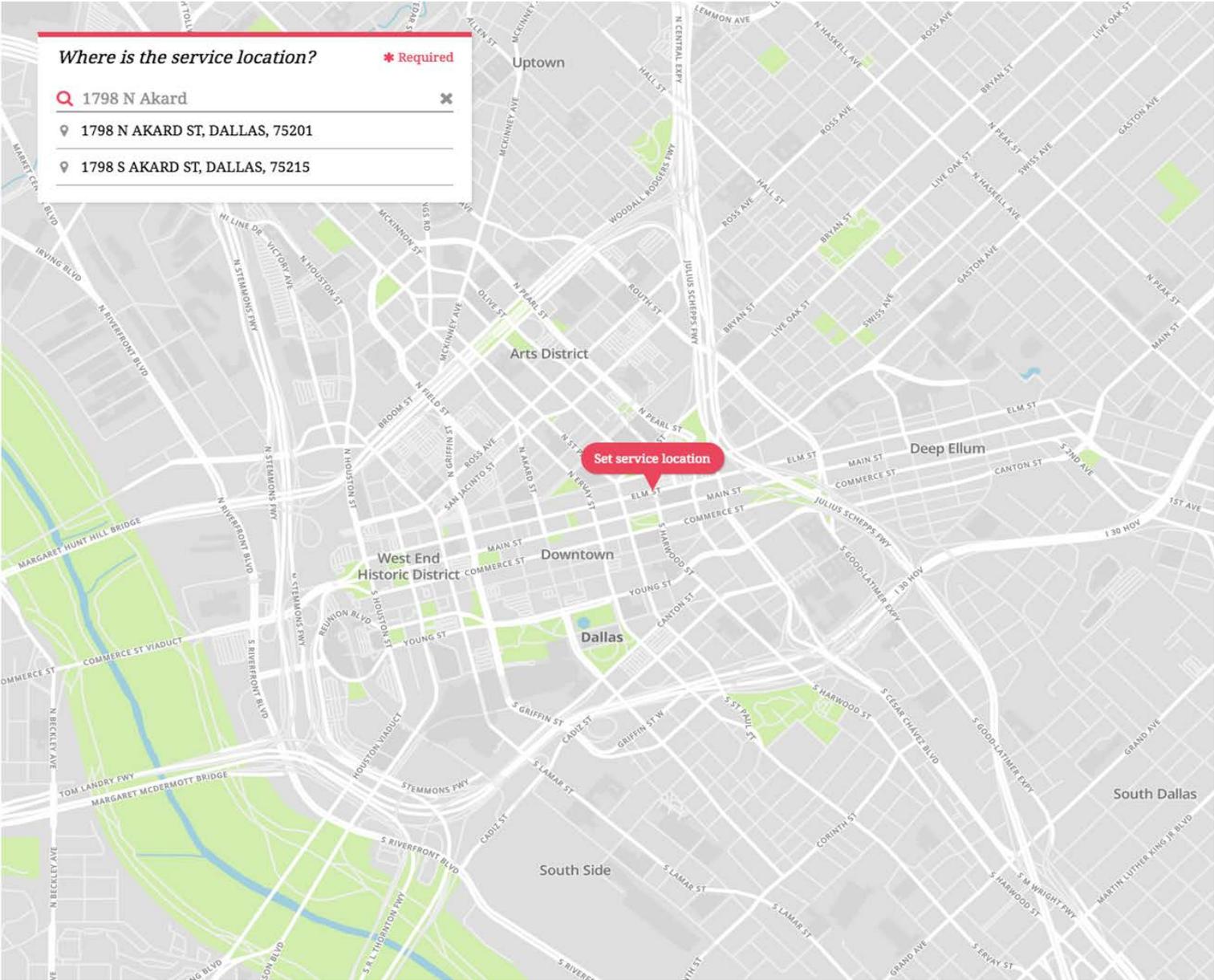
Service
Substandard
Structure - Apt -
CCS

Location

Details

Contact

Submit



Citizen View 3—Describe Issue



Service

Substandard
Structure - Apt -
CCS



Location

1798 N AKARD ST



Details

All required
details provided.



Contact



ERT (ESTIMATED RESPONSE TIME) IS 10 DAYS.

Is the location tenant or owner occupied?

- Owner
- Tenant
- Unknown

Does it appear as if people are living in the building?

- Yes
- No
- Do not know

Is there fire damage?

- Yes
- No
- Do not know

Additional Information

There is damage to the building

Upload a photo



Next

Citizen View 3—Review Report

-  **Service**
Substandard
Structure - Apt -
CCS
-  **Location**
1798 N AKARD ST
-  **Details**
All required
details provided.
-  **Contact**
All required
details provided.
-  **Submit**

Please review your report before submitting

Service

Service Request
Substandard Structure - Apt - CCS



Location

Service Location
1798 N AKARD ST



Details

Is the location tenant or owner occupied?
Tenant

Does it appear as if people are living in the building?
Yes

Is there fire damage?
Yes

Additional Information
There is also water damage



Contact

Name
John Doe

Email Address
John.Doe@test.com

Phone Number
214-555-1212



Submit

Citizen View 5—Get Service Request Number

-  **Service**
Substandard
Structure - Apt -
CCS
-  **Location**
1798 N AKARD ST
-  **Details**
All required
details provided.
-  **Contact**
All required
details provided.
-  **Submit**
17-00884211

Thank you.

Your service request has been submitted.



Service request number is

17-00884211

You can view your request updates/status [here](#).



Service Resolution Estimate
10 Business Days

Expected Resolution Date
September 20, 2017

Citizen View 6—View List of Recent Requests

Recent Service Requests



- Substandard Structure - Apt - CCS
17-00884211

 Open
2 minutes ago

- Substandard Structure
17-00884210

 Open
9 minutes ago

- Substandard Structure
17-00884209

 Open
5 hours ago

- Substandard Structure
17-00884208

 Open
5 hours ago

- Substandard Structure - Apt - CCS
17-00884207

 Open
7 hours ago

- Substandard Structure
17-00884206

 Open
19 hours ago

Substandard Structure - Apt - CCS
17-00884211

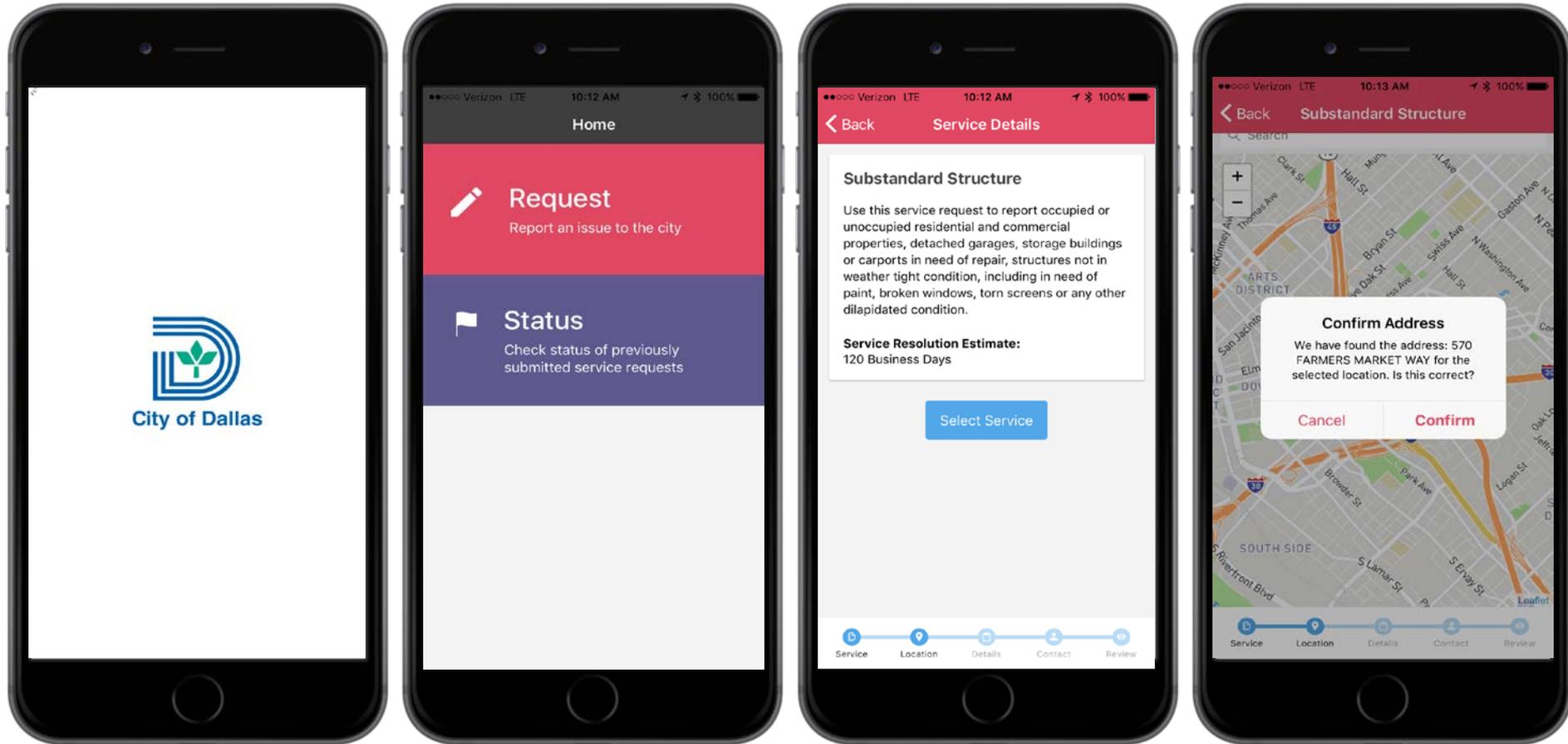
Address:
1798 N Akard St, Dallas, TX 75201, USA

Created:
September 6, 2017

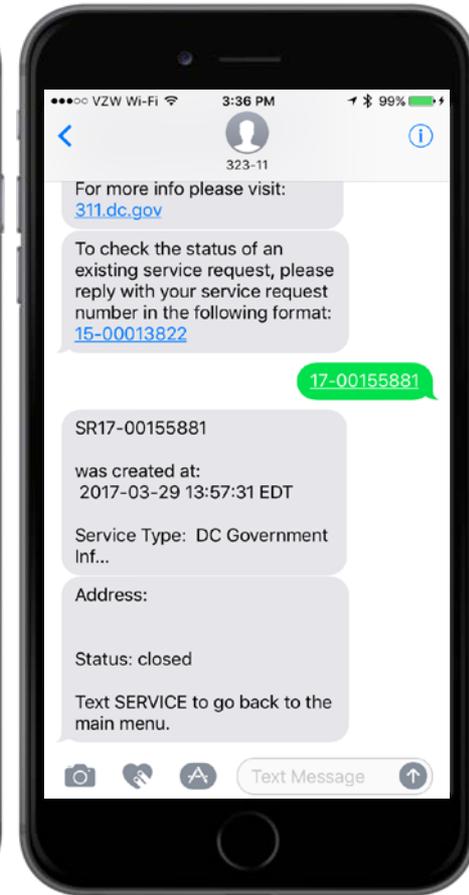
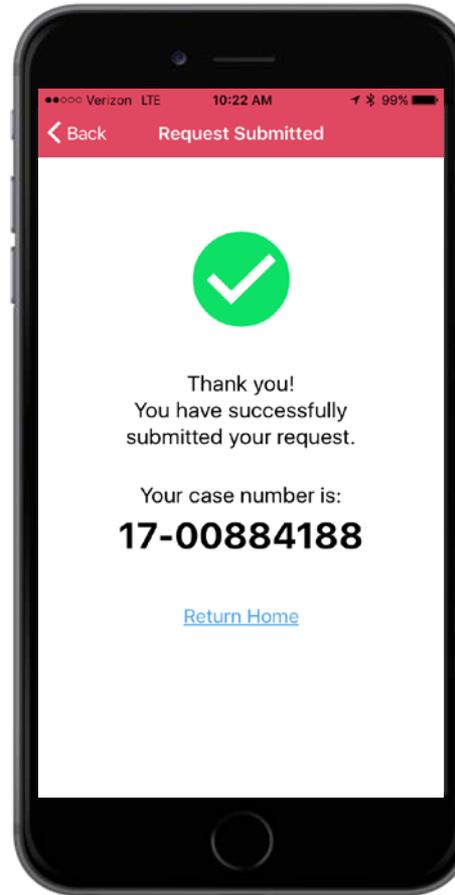
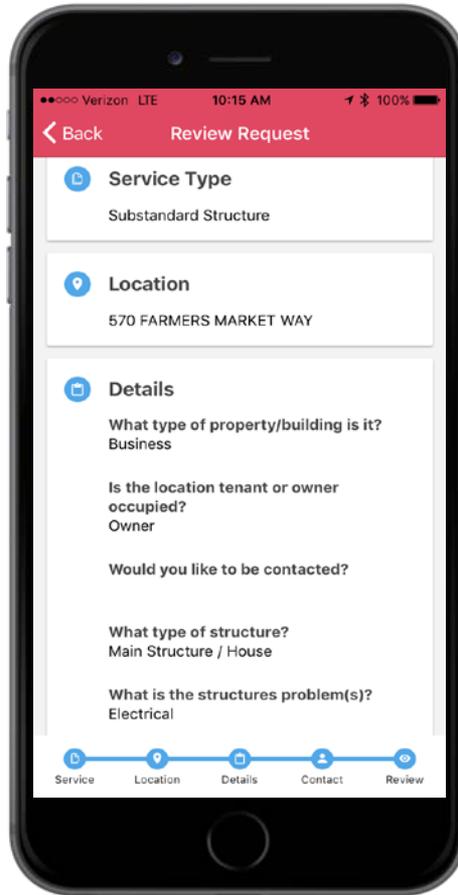
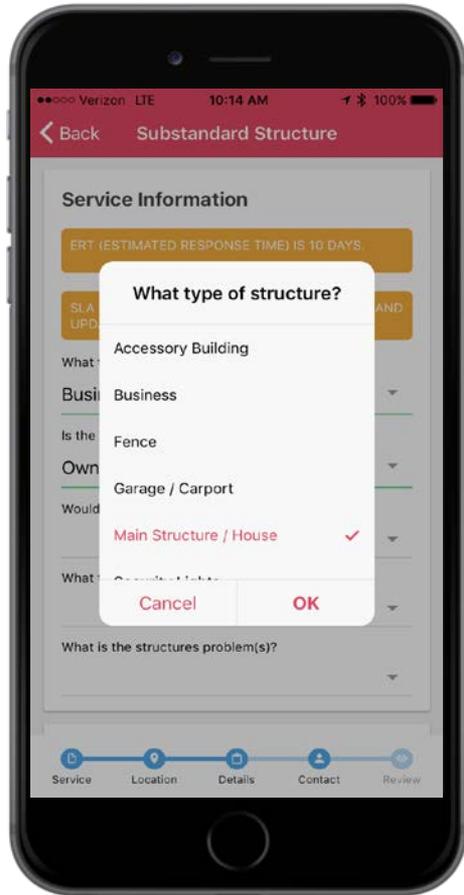
Received Via:
Web

Service Activities						
Action	Activity	Outcome	Status	Created Date	Activity Outcome	Outcome Applied Outcome
Edit Del	Initial Inspection	Complete		9/6/2017	Violation Confirmed	Violation Confirmed
Edit Del	Assign Crew	Not Started		9/6/2017		
Edit Del	Contact Customer by Telephone at the Beginning of the Process	Complete		9/6/2017	Customer could not be contacted - Voicemail left	Customer could not be contacted

Citizen View 7—Sample Request via Mobile App



Citizen View 8—Sample Mobile App Confirmation



Council View 3—Citywide Overview



DASHBOARD

Service Request Responsiveness KPIs

Use this dashboard to track trends in city responsiveness to service requests based on service request volume, priority, and resolution time.

As of Aug 23, 2017 10:41 AM Viewing as Disha Albert

Refresh Edit

Open Service Requests

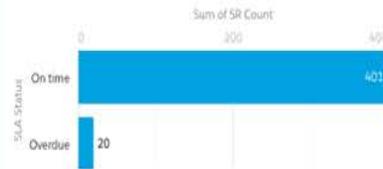
Realtime



View Report

Open SR's SLA Status

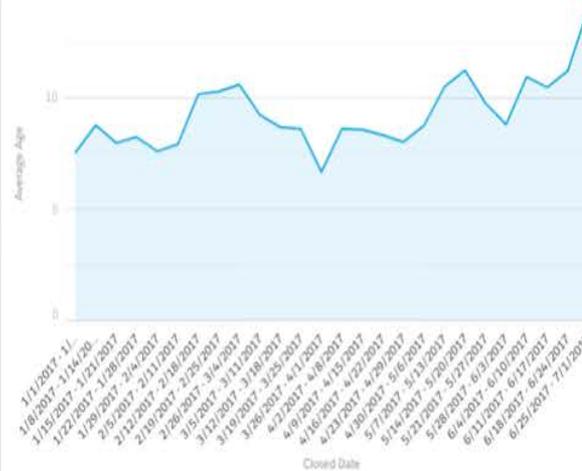
Realtime



View Report

Average SR Resolution Time

Year to Date



View Report

Opened Service Requests, by week

Last 120 Days



View Report

SR Resolution Time (Days)

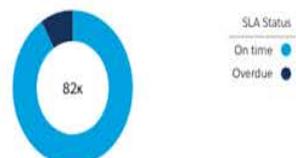
Last 120 Days



View Report

Cases Closed On Time

Last 120 days



View Report

Closed Service Requests, by week

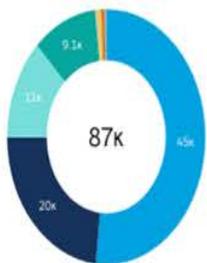
Last 120 Days



View Report

Channel Distribution

Last 120 Days



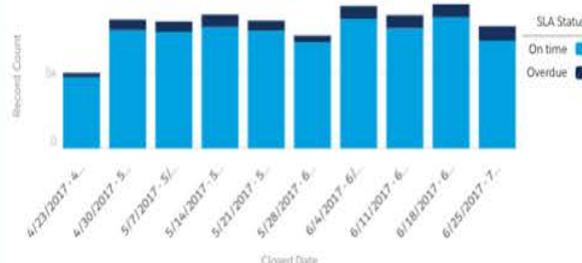
View Report

Service Request Origin

- Phone
- Proactive
- Web
- Mobile Apps
- Mass Entry
- Police/Fire Dispatch
- Radio
- 311 IVR
- E-Mail
- City Hall on the GO

Trend in On Time Closures

Last 120 days



View Report

Priority Distribution

Last 120 days



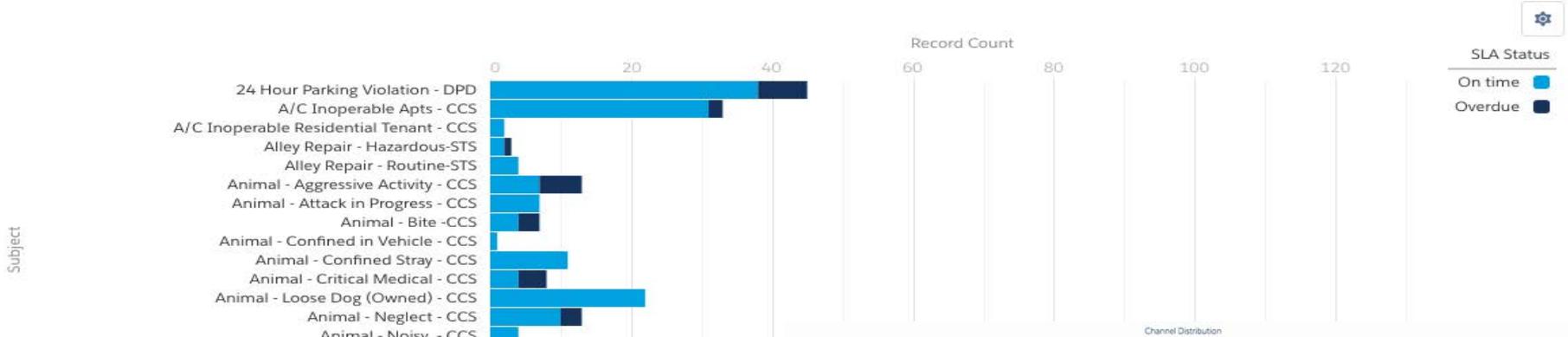
View Report

Council View 4—Citywide Data

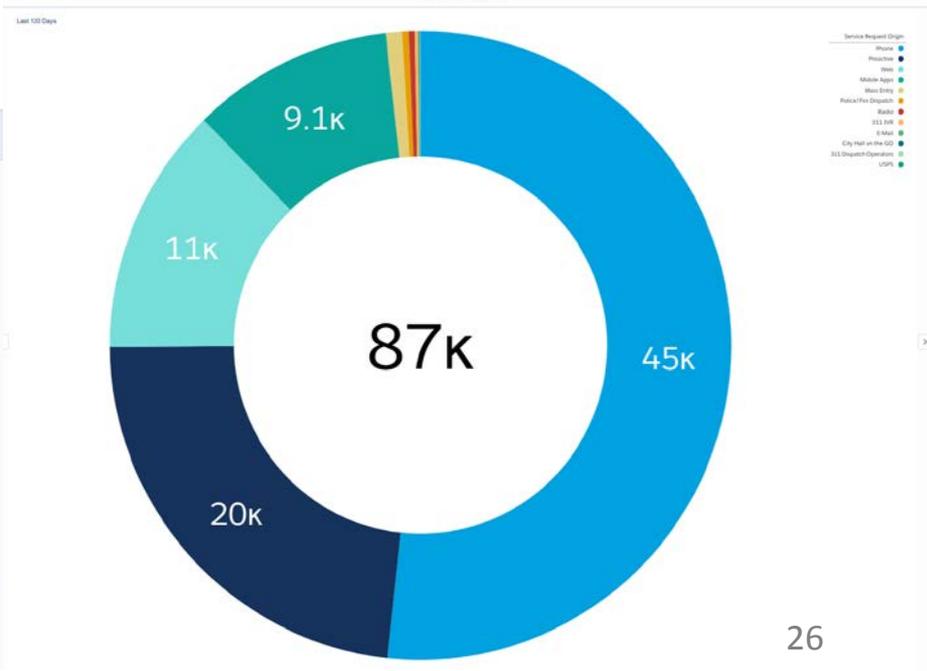
REPORT Cases Opened Today



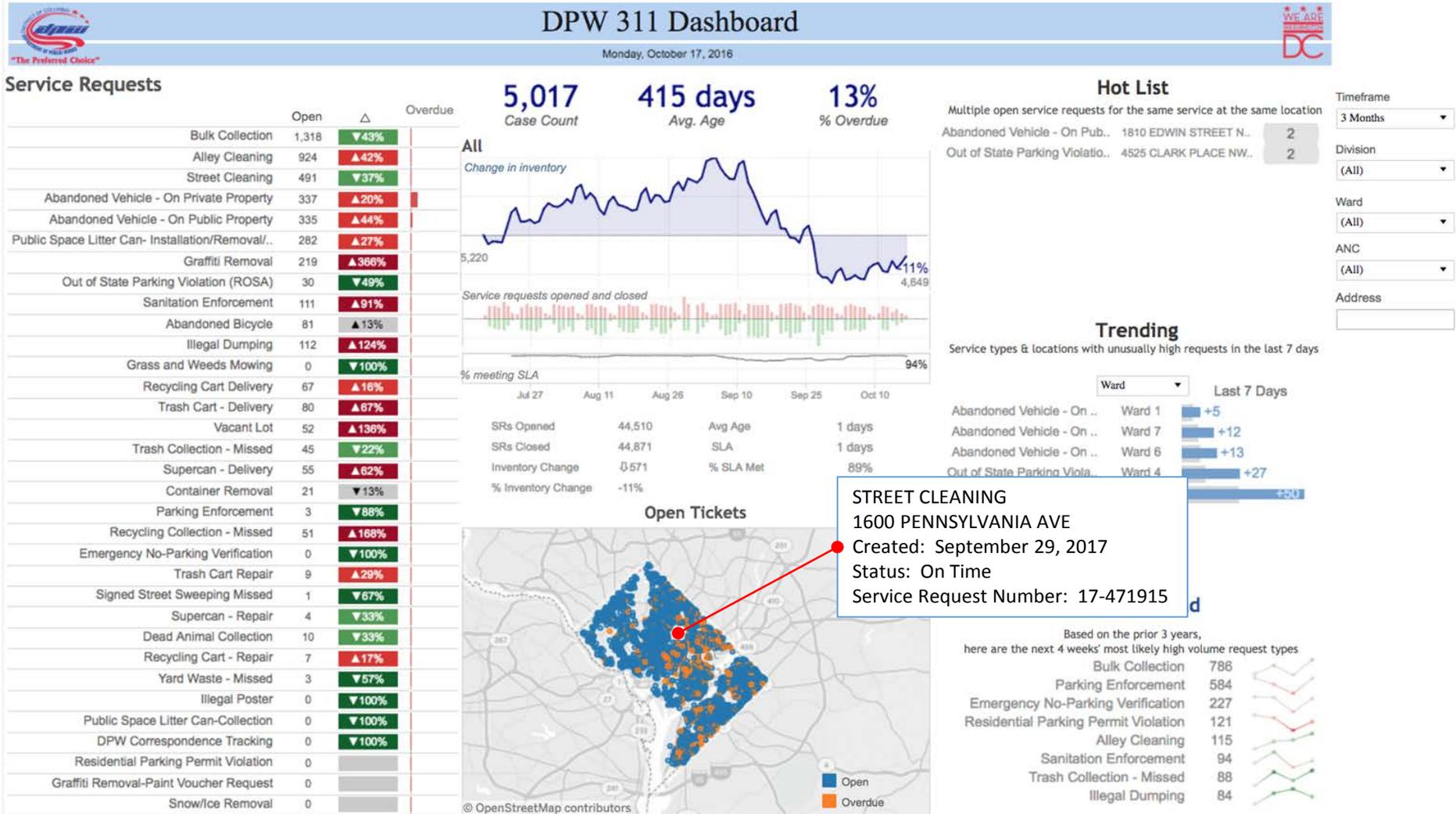
Total Records
1,697



SUBJECT ↑	SLA STATUS ↑	SERVICE REQUEST OWNER ↑
24 Hour Parking Violation - DPD (45 records)	On time (38 records)	Dirk Nowitzki (38 records)



City of Washington DC 311 - Department View



STREET CLEANING
 1600 PENNSYLVANIA AVE
 Created: September 29, 2017
 Status: On Time
 Service Request Number: 17-471915

Based on the prior 3 years, here are the next 4 weeks' most likely high volume request types

Bulk Collection	786
Parking Enforcement	584
Emergency No-Parking Verification	227
Residential Parking Permit Violation	121
Alley Cleaning	115
Sanitation Enforcement	94
Trash Collection - Missed	88
Illegal Dumping	84

Implementation Plan

- Project Kickoff: November 2017
- Customer Journey Mapping sessions
 - Get the “outside-in” perspective
 - Identify the most significant customer touchpoints
- Streamline number of service request (SR) types
 - Simplify the steps to report issues
 - Minimize City jargon

Implementation Plan, cont'd

- Configure system
 - Service Requests
 - Knowledgebase
 - Dashboards and reports
 - Mobile app
 - Integration with other City systems
- Migrate existing data to new system
- Train 800+ city staff
- Estimated go-live: August 2018

Next Steps

- Council consideration of contract authorization on October 25
- Progress reports to Government Performance & Financial Management committee during project implementation



311 System - Customer Request Management System Replacement

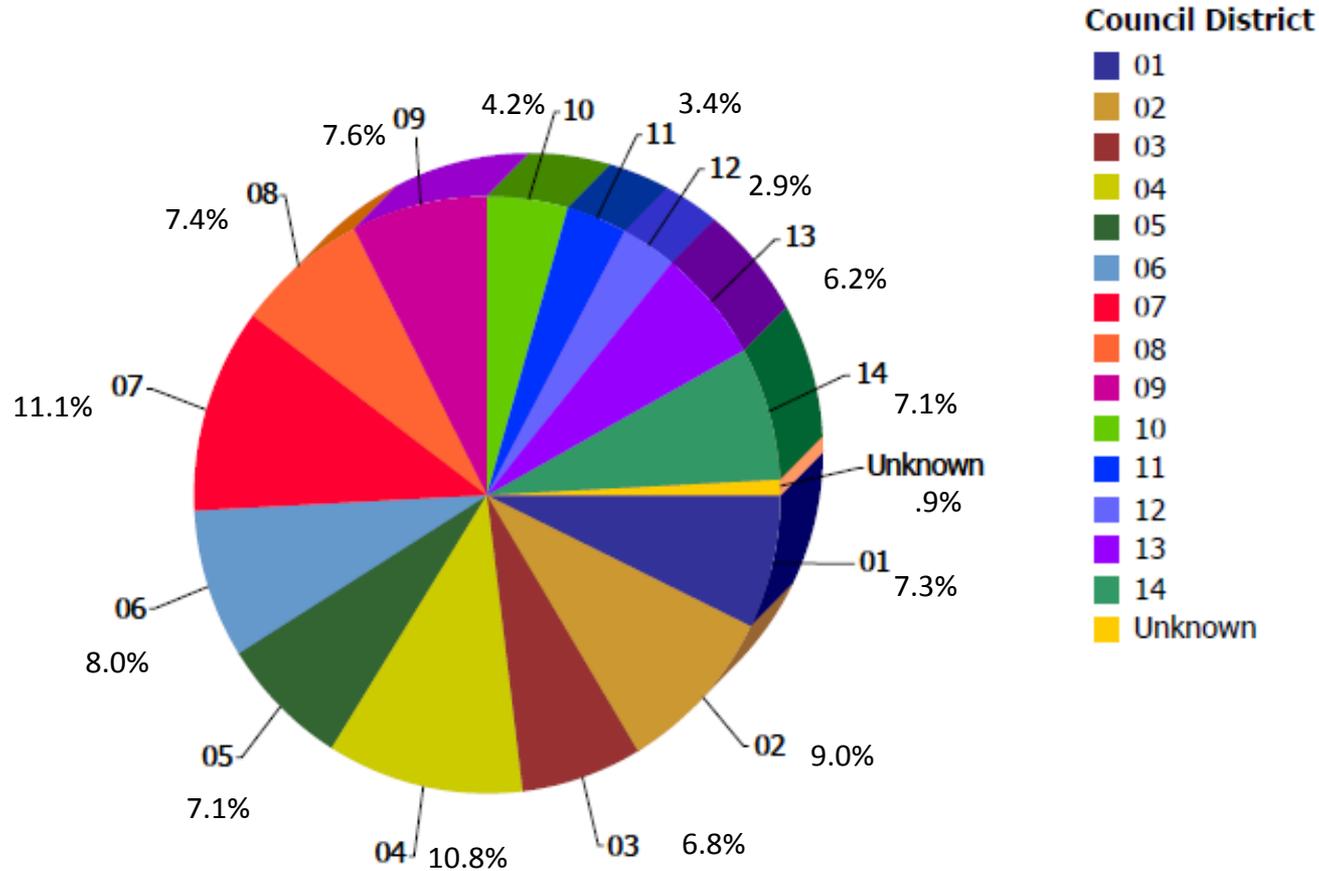
**Dallas City Council
October 18, 2017**

**William Finch, CIO
Communication & Information Services**

**Margaret Wright, Managing Director
311 Customer Service Center
City of Dallas**



Appendix: Service Request Volume by District FY 16-17



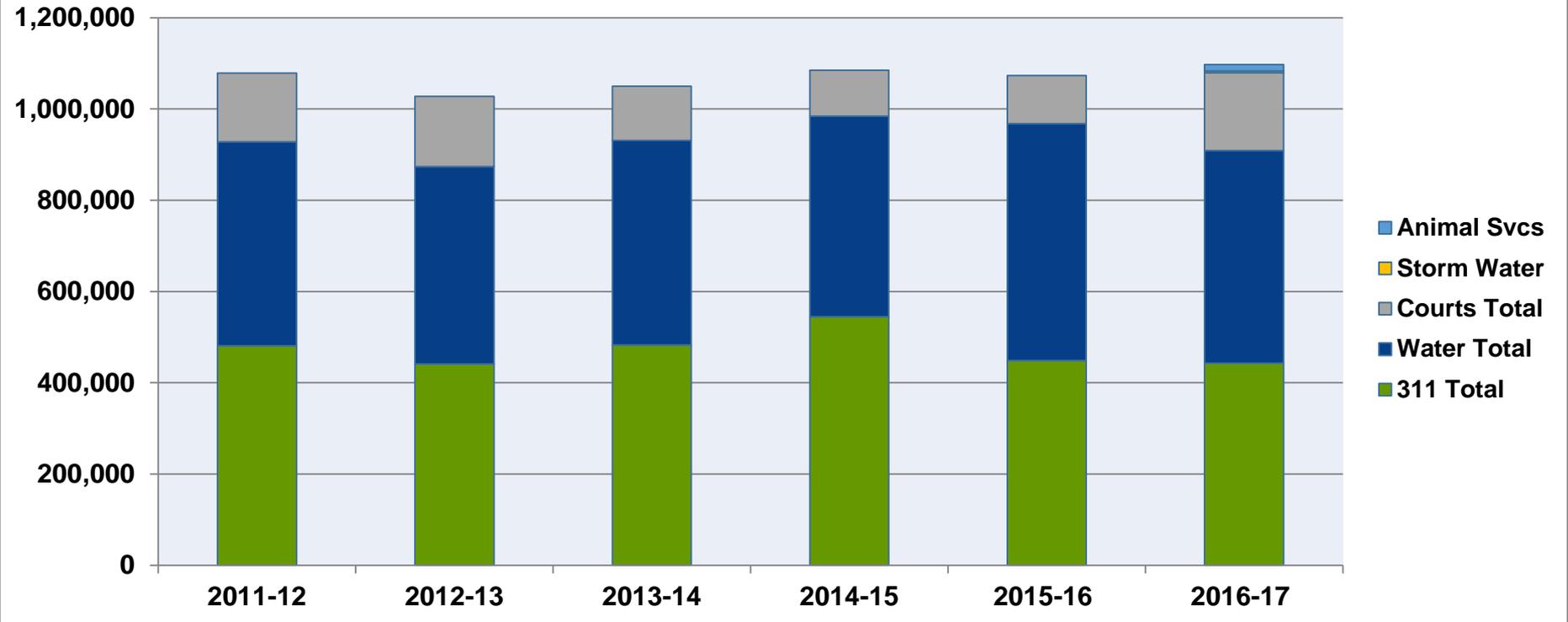
Appendix: Most Common Service Requests FY 17

Service Request Type	Number Created	SLA Goal	Average Days to Close	Total On-Time
High Weeds	27,126	20 days	16	60.6%
Litter	24,019	20 days	16	62.1%
Garbage Roll Cart	21,426	7 days	2.2	100%
Signs - Public Right of Way	18,858	5 days	.6	95.9%
Garbage - Missed	18,436	3 days	.9	99.3%
Obstruction Alley/ Sidewalk/Street	16,439	45 days	19	87.2%
Dead Animal Pick Up	14,935	1 day	.3	97.3%
Recycling Roll Cart	13,441	7 days	2.6	95.81
Bulky Trash Violations	11,597	7 days	5.1	79.4%
24 Hour Parking Violation	10,795	7 days	3.9	89.3%



Appendix: 311 Call Volume

311 Customer Service Center Call Volume



Final Score Tabulation

Vendor	Cost 30%	Experience & Capability 15%	Functional Match 20%	Technical Match 20%	Business Inclusion & Development 15%	Total Score
Incapsulate/ Salesforce	23.12	14.00	18.14	17.00	15.00	87.26
IBM/ Microsoft	30.00	11.14	13.43	15.00	15.00	84.57

Vendor	Cost 30%	Experience & Capability 15%	Functional Match 20%	Technical Match 20%	Business Inclusion & Development 15%	Total Score w/out price
Incapsulate/ Salesforce	--	14.00	18.14	17.00	15.00	64.14
IBM/ Microsoft	--	11.14	13.43	15.00	15.00	54.17