



Customer Relationship Management System Update

November 23, 2021



Strategic Alignment: Goal 5

PROMOTE TRANSPARENT AND CONSISTENT
COMMUNICATION AMONGST ALL MEMBERS OF
THE COMMUNITY

311 & Service Request Cross-Functional Team

- Objectives:
 - Holistic process review
 - Segment the issues
 - Blend *Voice of the Customer* data
 - Define KPIs for improved decision making
 - Reporting requirements
 - Improve communication

FY 2022 KEY DELIVERABLES



Strategy: Leverage and expand the use of current and new technology to reduce inefficiencies and improve communications

- Customer Relationship Management (CRM) System
 - Multi-phase project
 - Phase 1 – May-June: Test & Pilot
- E-forms and automation expansion (Reform)
 - Performance Office, LSS, CFTs
 - Sept 1– April 15: 205,000+ submissions
- Expand Wireless Internet
 - 7 of 9 FY21 locations completed



FY21 Goal 5 Update

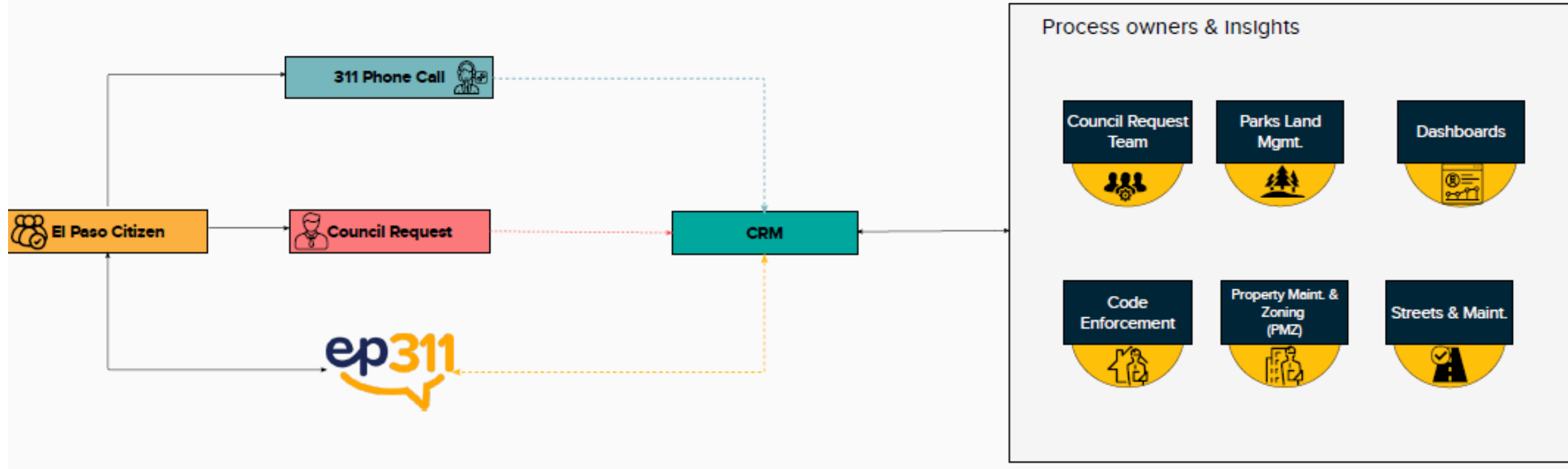
Customer Relationship Management System

Strategy: *Leverage and expand the use of current and new technology to reduce inefficiencies and improve communications*

- Centralized platform for managing customer service requests
- Provide insight into resident requests
- Improved Service Delivery
- Cohesive system unifying 311 call center, Council Request (CR) process, and City departments
- Multi-phase project

CRM Process

CRM Process





Customer Relationship Management System



	Phase 1 System Build, Pilot Group 1	Phase 2 Onboard Group 2	Phase 3 Onboard Group 3	Phase 4 Onboard Group 4
Activities	Build Environments	EP311 Focus Group feedback	Additional 2-3 Dept Configurations	Additional Dept Configurations
	Requirements	Parks Land Mgmt Configuration	Council Request Process - All District Offices - Staff configuration	Additional Status Code improvements
	Integrations	PMZ Configuration	Additional Work Order Status Code edits	Dashboard/Report Development
	311, Code Compliance, S&M configuration	Edit Code Compliance & PMZ Status Codes	Dashboard/Report Development	Training
	Training	Automate Code Compliance Comments	Training	
	311 Go Live	Council Request Ombudsperson Process - Requirements		
		Dashboard/Reports Development		
		Training		
	Phase 1 Outcomes	Phase 2 Outcomes	Phase 3 Outcomes	Phase 4 Outcomes
Outcomes	Stage & Production Environments	Code Compliance & PMZ - Status driven updates	CR Process & SR departments onboard in CRM	TBD
	Phase 1 integrations complete	Improved Service Request handling & communication in CRM (Code, PMZ, S&M)		
	Training: 311, Code, S&M	PMZ, Parks Land Mgmt onboard in CRM		
	311 Live in CRM	Ombudspersons onboard in CRM		

CRM Timeline

CRM Deployment - Completed

- PHASE 1
 - Build Framework & understand Key Customer requirements
 - Integrations to Work Order Systems
 - Pilot Groups set up
 - Training for Phase 1 Pilot Groups
 - Completed June/July 2021



CRM Deployment – In Progress

- PHASE 2
 - Additional Service Request configuration
 - Department system process improvements
 - Focus group discussions
 - Improve Communication for Status Updates
 - CR Ombudsperson process configuration
 - Training
 - Dashboard Reporting development
 - Phase 2 target end of 2021



CRM Deployment – Next Phase

- PHASE 3
 - CR Process - Council Staff configuration
 - Additional Service Request configuration
 - Improve status updates
 - Dashboard Reporting development
 - Training
 - Phase 3 target May 2022



Dashboards



EPA TX Stage Environment | Service | Dashboards

SAVE AS | NEW | EDIT | DELETE | SET AS DEFAULT | SHARE DASHBOARD | ASSIGN | REFRESH ALL | ADVANCED FIND

District Dashboard

Total Emails Marked as Reviewed by Month

My Team's Emails

Status Reason	CountAll (Status Reason)
Completed	12

Top 5: Request Type

My Team's Requests

Request Type	CountAll (Request Type)
Commercial Vehicle in R...	9
Airport - El Paso Intern...	5
Capital Improvement Prog...	5
Animal Services	2
Debris/Weeds on Street	1

Top 5: Most Requested Business Unit

My Team's Cases

Business Unit	CountAll (Business Unit)
El Paso Police Departmen...	220
Property Maintenance & Z...	65
Street Maintenance	25
311	16
311 Action Center	12

Request by District Owner

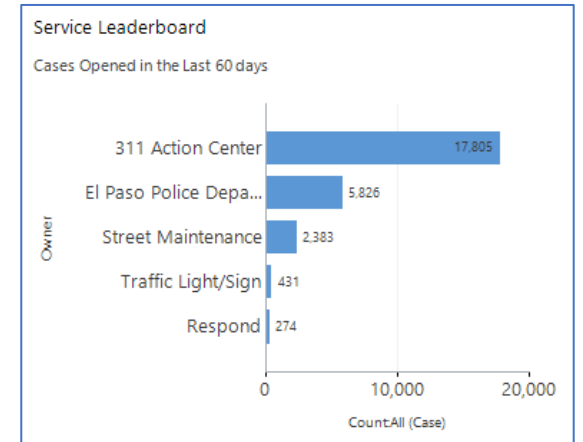
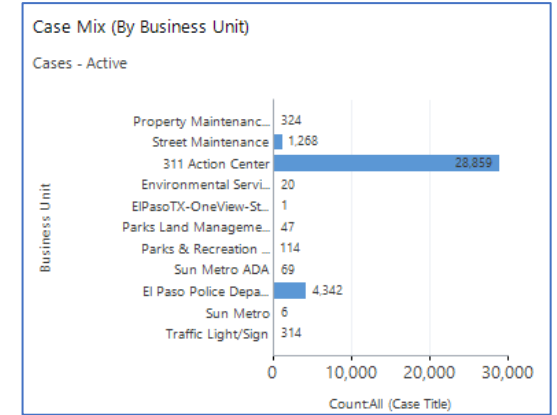
Search for records

Flex Fields S...	Date Created	Case Number (Regardin...	On...	Subject	Classification	Priority ...	Origin (Rega...	Service Activity Status Res
District : TEST	6/22/2021 5:02 PM	CAS-01075-G9T0D7		Capital Improvement Program	Information	Normal	Phone	Received
District : TEST	6/22/2021 5:04 PM	CAS-01076-V2P9W4		Capital Improvement Program	Information	Normal	Phone	Received
District : TEST	6/23/2021 5:09 PM	CAS-01079-C0Z7V4		Capital Improvement Program	Information	Normal	Phone	Received
District : TEST	6/23/2021 5:17 PM	CAS-01080-Q5V7D3		Capital Improvement Program	Information	Normal	Phone	Received
District : TEST	6/23/2021 6:49 PM	CAS-01082-N3K1K9		Capital Improvement Program	Information	Normal	Phone	Received
District : 8	6/25/2021 5:17 PM	CAS-01092-X5T0P9	2793...	Waste on Streets	Service	Normal	Web	Received
District : 8	6/4/2021 5:16 PM	CAS-00996-F0P8D1		Oversized vehicle	Service	Normal	Web	Received
District : 8	6/4/2021 5:19 PM	CAS-00997-D4Q0R6	2792...	Overgrown Grass/Weed	Service	Normal	Phone	Received

Cases by District Owner

My Team's Cases

Owner	CountAll (Case)
311 Action Center	346



Dashboards

- District, Executive, Operations
- By Service Request Type
- By Submission method
- By District
- By Department
- CR requests by District



Misión

Brindar servicios excepcionales para respaldar una vida y un lugar de alta calidad para nuestra comunidad



Visión

Desarrollar una economía regional vibrante, vecindarios seguros y hermosos y oportunidades recreativas, culturales y educativas excepcionales impulsadas por un gobierno de alto desempeño



Valores

Integridad, Respeto, Excelencia, Responsabilidad, Personas