



# Customer Relationship Management (CRM)

City of Long Beach, Technology & Innovation Department  
October 1, 2019

# Customer Relationship Management (CRM)

## CRM Project Goals

1. Provide residents easy access to City services
2. Provide tracking and monitoring capabilities to improve City service delivery
3. Improve resident engagement and access in conformance with the City's Language Access Policy
4. Improve openness, transparency, and accountability
5. Improve alignment of resources with service demands
6. Enable district-level reporting capabilities that will drive improved data-informed decision making



## History of the CRM project

- Technology & Innovation Department engaged consultant to create strategy for CRM System
- Technology & Innovation published RFP to solicit potential vendors for CRM implementation
- Nine responsive vendors responded to RFP and request for clarifications
- Multi-departmental Selection Committee reviewed and ranked RFPs
  - Five firms invited for product demonstrations
  - Best and Final Offer request issued to top two finalists
  - Selection Committee selected Salesforce implemented by Deloitte Consulting

# Customer Relationship Management (CRM)

## About Salesforce

- Industry CRM leader (19.5% of market share in 2018)
- *Leader* in Gartner Magic Quadrant for CRM for 13 years
- Public sector experience
- Flexible platform in both look and functionality
- Scalable, cloud-native platform



## About Deloitte

- Proven track record of experience with City of San Diego and Orange County
- Stellar public sector customer references
- All project team members local to Southern California

**Deloitte.**



# Customer Relationship Management (CRM)

## Project scope

- Replace current GO Long Beach app with a more robust system
- Create Customer Self Service system for constituents that can be accessed via tablet, phone, or laptop
  - Allow constituents to track status of requests
  - Create a knowledge base to help residents who are placing requests
- Create a robust back office utility for City Staff
  - Allow Staff to enter requests from constituents that call in and/or check status of requests
  - Enable seamless interfaces to back office workorder systems
  - Provide metrics to City Staff and Officials on service requests
    - Include duration to close
    - Identify multiple requests on same issues
    - Include geographic location of requests



# Customer Relationship Management (CRM)

## What to Expect

### Public

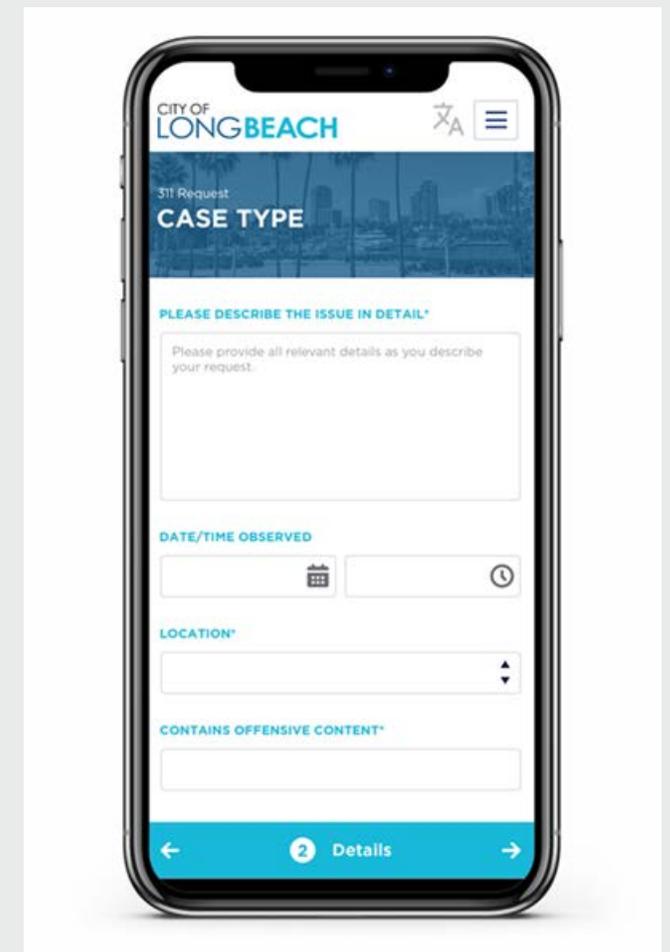
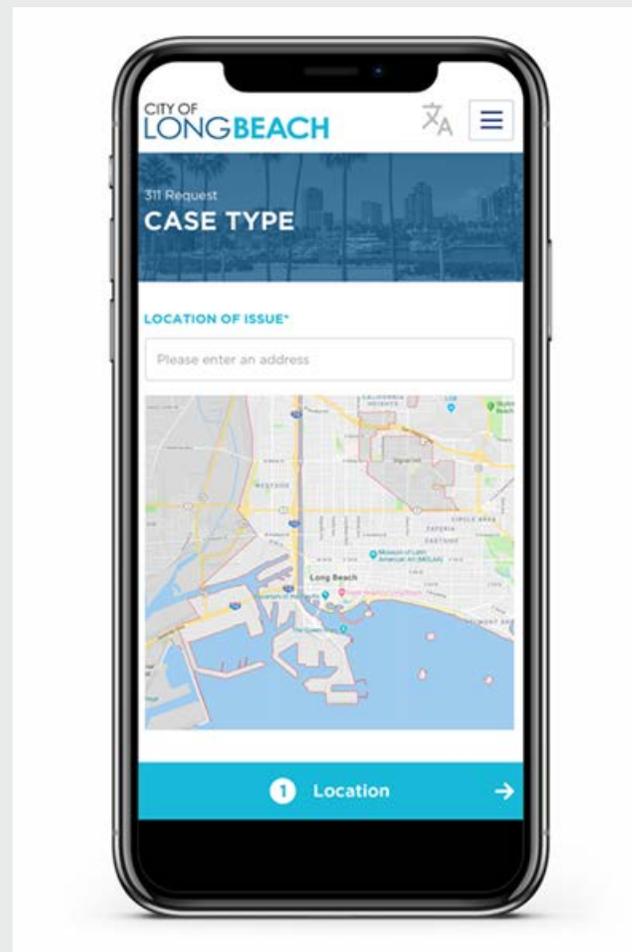
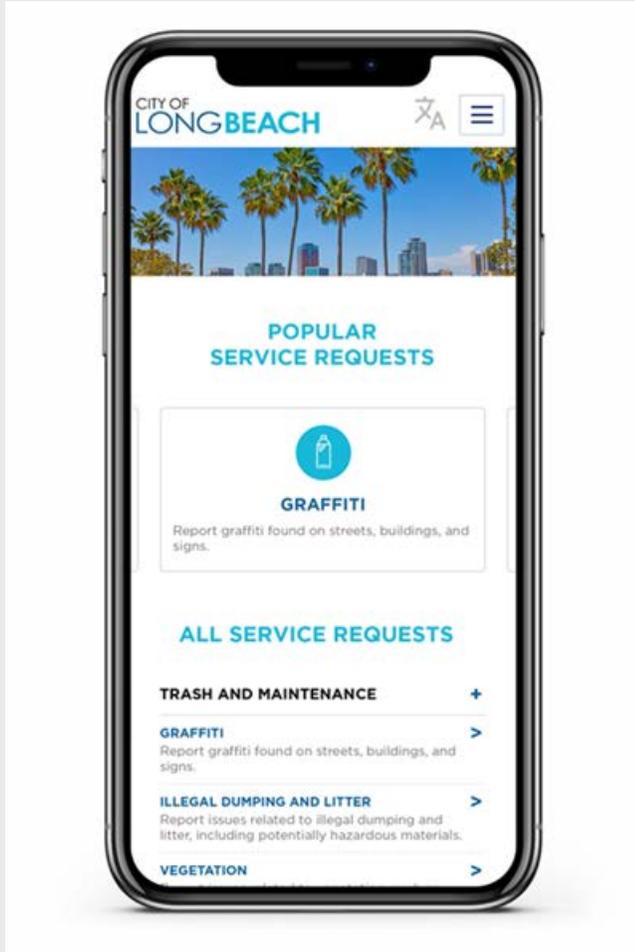
- Replacement of GO Long Beach with modern technology
- Multilingual support in conformance with the City's Language Access Policy
- Enhancements to longbeach.gov to serve as a one stop source for information about City services
- All existing GO Long Beach topics, plus new topics backed by digital workflows

### Staff and Officials

- One common platform to manage interactions with the public
- Insights into performance through reporting tools
- Improved ability to recognize and address duplicate service requests

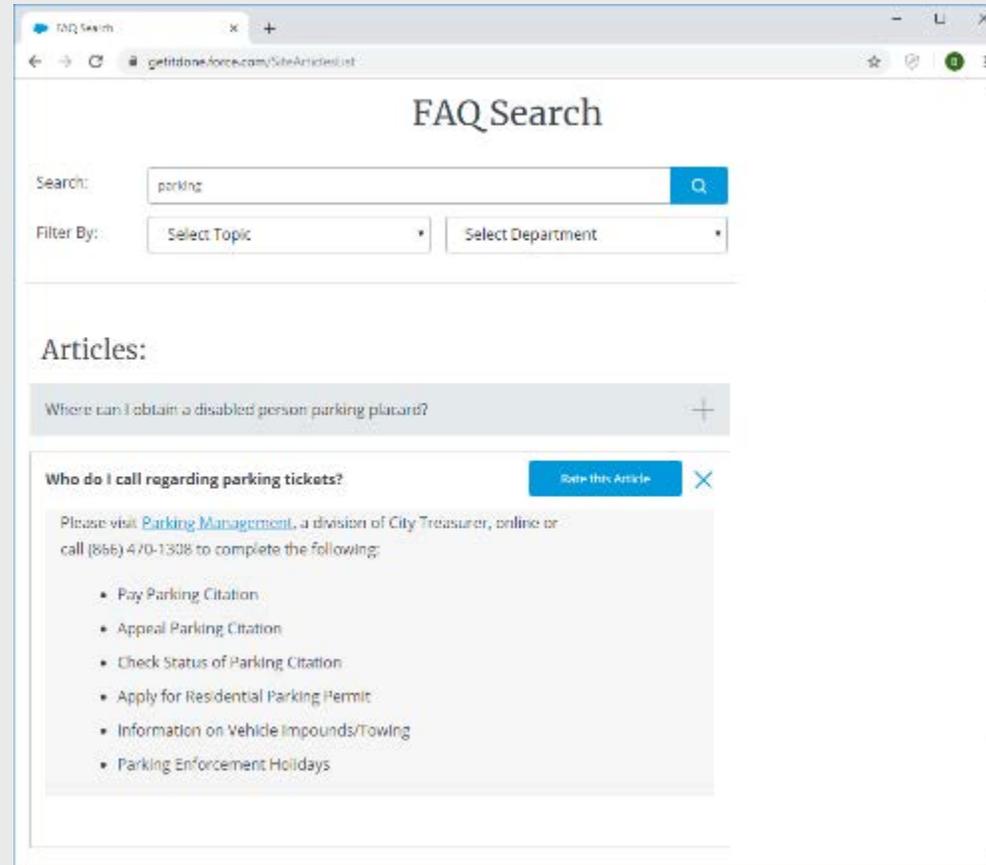
# Customer Relationship Management (CRM)

## What is Possible - new GO Long Beach



# Customer Relationship Management (CRM)

## What is Possible – Knowledge Base



# Customer Relationship Management (CRM)

## Budget and Timeline

- First-year cost not to exceed: \$2,168,768
  - Software Licensing, with contingency: \$358,768
    - Licensing costs built into the 2020 Budget
  - Implementation Services, with contingency: \$1,815,000
    - Funding of \$962,000 included in the Critical Technology Infrastructure Needs presentation for implementation services
    - Remainder of funding from savings in other areas of critical technology needs and within TID budget
- Project kick off last quarter of 2019 and launch of new CRM system by end of 2020



# Customer Relationship Management (CRM)