



# City of San Antonio

## Agenda Memorandum

**File Number:** 17-5953

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**Agenda Item Number:** 6.

**Agenda Date:** 11/9/2017

**In Control:** City Council A Session

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**DEPARTMENT:** Finance

**DEPARTMENT HEAD:** Troy Elliott

**COUNCIL DISTRICTS IMPACTED:** Citywide

**SUBJECT:**

Amendment to Customer First San Antonio (C1SA) 2.0

**SUMMARY:**

An Ordinance authorizing an amendment to the agreement between Verint Americas, Inc. and the City of San Antonio for software and associated project implementation services to upgrade the San Antonio's Customer Relationship Management (CRM) system to the most current platform for a total cost of \$396,761.78.

**BACKGROUND INFORMATION:**

The City of San Antonio's 311 Customer Service Office supports all City departments by handling informational calls and processing service requests for Animal Care Services, Development Services/Code Enforcement, Metro Health, Parks and Recreation, Solid Waste Management, and Transportation and Capital Improvements. In FY 2017, the Call Center received 789,117 calls for assistance.

The Customer First San Antonio (C1SA) project implemented the City's current Customer Relationship Management (CRM) system in October 2011. The system provides a streamlined process by which the 311 Customer Service Office, as well as staff in the various departments, can track resident requests for services.

With implementation of the CRM system in 2011, the City improved communications between departments and 311 Customer Service Office, data tracking/reporting, customer service and overall service delivery. As part of the project, the following was achieved:

- transitioned departments to SAP with enhanced work order management systems to better track service

requests;

- Implemented timelines and workflow processes for all service requests;
- enabled more detailed information available to 311 staff in order to advise residents of pending work orders; and
- provided additional communication channels with the City through the implementation of the 311 web portal and mobile app.

The CRM system continues to be utilized by the 311 Call Center, City Council offices, as well as some of the City departments and maintains customer data for residents who have called the City requesting services and have provided their information. The system, however, is in need of an upgrade that allows the City to further improve access to information regarding service requests. The Customer First San Antonio (C1SA) 2.0 Project will improve the existing CRM system and incorporate the following customer service objectives:

- enhance current digital platforms for citizens for better access to information regarding City services;
- provide residents more visibility of their requests including the progress and expected timeline for completion of submitted requests;
- provide residents with the ability to track and preview outcomes of services requests through a new ‘My Requests’ portal;
- implement a standardized workflow process across all departments for consistent monitoring and reporting of work completed; and
- increase the functionality of the 311 web portal by providing easier access to information and self-service options to submit service requests.

**ISSUE:**

Approval of this ordinance authorizes the third Amendment to the Public Sector Agreement Between Verint Americas, Inc. and the City of San Antonio to upgrade the City’s Customer Relationship Management (CRM) system to the most current platform. The amendment maintains the current support agreement for the CRM system and incorporates the services for the enhancements. City Council approved the initial agreement in April 2010 and also authorized the contract with Lagan Technologies (subsequently purchased by Verint Americas, Inc.) for the implementation of the current CRM system which included annual software maintenance and support.

The C1SA 2.0 project is scheduled to begin in November 2017 with a timeline of ten months to complete. The major milestones for the project are identified below and further detailed in the Scope of Work:

MAJOR MILESTONES	TIMELINE
Project Initiation and Installation of version 15.2 on development environment	November 2017
Produce model and specifications for standardized workflow process	January 2018
Install Knowledge, Search and My Account Portal	February 2018
Produce online forms	March 2018
Completion ECCO, SAP, and Chameleon Interfaces	March 2018
Upgrade to quality assurance environment	March 2018
Complete User Acceptance Testing	June 2018
Go Live/Post Project Activities	August 2018

The Local Preference Program does not apply to this contract since it was solicited prior to the effective date of the program.

The Veteran-Owned Small Business Preference Program does not apply to this contract since it was solicited on or prior to January 15, 2014, the effective date of the program.

**ALTERNATIVES:**

Approval of this amendment to the existing contract allows the City to leverage the existing CRM system and achieve digital enhancements through a technology upgrade. The alternative would be to work through the budget process to obtain funding for the development and implementation of a new CRM system. This would delay the customer service enhancements which will provide more information to residents regarding their service requests.

**FISCAL IMPACT:**

This ordinance authorizes the investment for technological upgrades to the City's CRM system in the amount of \$396,761.78. Funds for this item were approved as part of the New Technology Projects budget and is included in the FY 2018 - FY 2023 CIP. The annual maintenance and support for the CRM system will continue to be funded through the Information Technology Services Department annual operating budget. Upon execution of the Third Amendment, the Chief Financial Officer will appropriate funds for the project.

**RECOMMENDATION:**

Staff recommends approval of this amendment with Verint Americas, Inc. for the upgrade of the current Customer Relationship Management System in the amount of \$396,761.78.

This is an Amendment and a Contracts Disclosure Form is not required.