



# City of San Antonio

## Legislation Details (With Text)

**File #:** 18-5701

**Type:** Purchase of Supplies

**In control:** City Council A Session

**On agenda:** 11/1/2018

**Title:** Ordinance amending the agreement with Verint Americas, Inc. and approve a task order for Cityflag, Inc. in connection with the project implementation services to upgrade the Customer Relationship Management (CRM) system with an updated automation engine and mobile app changes for a total cost of \$146,819.32. Funding for this amendment was previously authorized and appropriated from 2016 Tax Notes in the Capital Improvement Program. [Ben Gorzell, Chief Financial Officer; Troy Elliott, Deputy Chief Financial Officer, Finance]

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Ordinance 2018-11-01-0860

Date	Ver.	Action By	Action	Result
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**DEPARTMENT:** Finance

**DEPARTMENT HEAD:** Troy Elliott

**COUNCIL DISTRICTS IMPACTED:** Citywide

### **SUBJECT:**

Amendment to Customer Relationship Management (CRM)

### **SUMMARY:**

This ordinance will authorize an amendment to the agreement between Verint Americas, Inc. and the City of San Antonio and approve a task order for Cityflag, Inc. in connection with the project implementation services to upgrade the Customer Relationship Management (CRM) system with an updated automation engine and mobile app changes for a total cost of \$146,819.32, funded from previously authorized 2016 Tax Notes.

### **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 departments. In FY 2018, the Call Center received 751,000 calls for assistance. Additionally, there were 15,000 cases created through the mobile application and 90,000 cases submitted through the City's 311 website.

The City's current Customer Relationship Management (CRM) system was implemented in October 2011 and upgraded in November 2017 with the latest software version which included additional system functionality. 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.

In August 2018, the City successfully launched a new mobile application through CityFlag that provides residents with an automated experience to report information to the City. An upgrade is required to the current CRM system to allow for additional functionality through an updated automation engine called Process Manager that will allow for the smooth transmittal of information from the CRM system to all backend work order management systems. The Process Manager product recently came to market and has been successfully implemented for other Verint clients and was not available when the CRM 2.0 project launched in November 2017. The original plan called for in-house development of the integration function. Ultimately, the Process Manager will provide 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 real-time information such as case status and service level expectation.

The CRM 2.0 project upgrade also requires changes to the recently launched 311SA mobile app since the app is integrated with the City's CRM system. The task order changes for Cityflag include GIS and user interface updates to support the enhanced visibility and transparency for service requests and status updates which would be consistent across all channels. The City will issue a task order with Cityflag to make those required changes.

## **ISSUE:**

Approval of this ordinance authorizes an amendment to the Public Sector Agreement between Verint Americas, Inc. and the City of San Antonio. The amendment will integrate a new Process Manager to allow for additional functionality between the CityFlag mobile application and the City's CRM system. The task order for Cityflag will provide the necessary changes required for the new mobile app to function with the enhancements being implemented for the CRM system.

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 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 will authorize an amendment to the agreement with Verint Americas, Inc., for a total cost of \$97,412.32. The ordinance will also authorize the task order for Cityflag for a total cost of \$49,407.00. Funding for the amendment and task order is funded from previously authorized 2016 Tax Notes.

**RECOMMENDATION:**

Staff recommends approval of this amendment with Verint Americas, Inc. and the task order for Cityflag for the upgrade of the current Customer Relationship Management System for a total amount of \$146,819.32.

The Contracts Disclosure Form is not required for the amendment or the task order.