



City of San Antonio

Agenda Memorandum

File Number: 19-1134

Agenda Item Number: 7.

Agenda Date: 1/17/2019

In Control: City Council A Session

DEPARTMENT: Finance

DEPARTMENT HEAD: Troy Elliott

COUNCIL DISTRICTS IMPACTED: Citywide

SUBJECT:

Customer Relationship Management System Pilot

SUMMARY:

This ordinance will authorize the City to utilize the State of Texas Department of Information Resources (DIR) contract DIR-TSO-3149 with Carahsoft Technology Corporation (Carahsoft) for an amount of \$352,932.35. Funding was previously authorized in the New Technology Project Budget for the purchase of licenses for a Customer Relationship Management system utilizing the Salesforce platform for a term of one year.

BACKGROUND INFORMATION:

Submitted for City Council consideration and action is the proposal submitted by Carahsoft to provide a licenses for a pilot Customer Relationship Management (CRM) system through the Salesforce Lightning platform.

In an effort to improve overall City information content, data management and reporting capabilities, the Information Technology Services Department (ITSD) is seeking to pilot a CRM system that will assist departments in managing their contracts and contract performance metrics after award. The piloted solution will provide departments with an automated means to track and report on key metrics related to contracts such as terms, costs, performance and other measures used to determine and evaluate types and levels of timely services being provided by vendors.

This effort aligns with the City's digital transformation initiative with a chief focus on a paperless move into the

Frost (Downtown Campus) building. The Salesforce solution is a CRM software platform that allows for the automation of manual processes that include content and contract management. Additionally, the piloted solution can serve as an overlay on legacy application systems in order to allow for a more modern and user friendly system interface.

ISSUE:

Currently, there is no single solution for managing or reporting on City Contracts after they are awarded. Contracts are currently managed by departments in various custom systems that provide reporting in various formats. This lack of uniformity can lead to the existence of inconsistent data being captured and reported.

The deployment of the proposed system would allow for increase in efficiency in areas such as: access of contract information, automated alerts of contract renewals, insurance expiration and contract amount depletion. The solution will also be compatible and integrate with core City business systems such as SAP, Filenet, Lagan (311/CRM), Microsoft365 and the City's IT work-order and asset tracking system, Remedy.

The planned term of this pilot program is one year. An assessment of the system's capabilities will be made after six months. At that time, ITSD may seek to expand on the pilot to include additional licenses and capabilities or issue a competitive solicitation.

The Small Business Economic Development Advocacy (SBEDA) Ordinance requirements were waived due to the lack of small, minority, and/or women businesses available to provide these goods and services.

The recommended award is an exception to the Local Preference Program.

The Veteran-Owned Small Business Preference Program Ordinance does not apply to non-professional service contracts, so no preference was applied to this contract.

ALTERNATIVES:

Should this action not be approved, the City would continue to utilize current legacy and custom systems as well as other non-automated processes for contract management and administration.

FISCAL IMPACT:

This ordinance will authorize a contract with Carahsoft Technology Corporation (Carahsoft) for an amount of \$352,932.35. Funding was previously authorized in the New Technology Project Budget for the purchase of licenses for a Customer Relationship Management system utilizing the Salesforce platform for a term of one year.

RECOMMENDATION:

Staff recommends approval of this action to authorize the City to utilize the State of Texas Department of Information Resources (DIR) contract DIR-TSO-3149 with Carahsoft Technology Corporation (Carahsoft) for an estimated initial cost of \$352,932.35 for the purchase of licenses for a Customer Relationship Management solution through the Salesforce platform for a term of one year.

This contract was procured by means of cooperative purchasing and a Contracts Disclosure Form is not required.