



# City of San Antonio

## Agenda Memorandum

**File Number:**19-1639

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**Agenda Item Number:** 3.

**Agenda Date:** 1/22/2019

**In Control:** Innovation and Technology Committee

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**DEPARTMENT:** Information and Technology Services Department

**DEPARTMENT HEAD:** Craig Hopkins, Chief Information Officer

**COUNCIL DISTRICTS IMPACTED:** Citywide

### **SUBJECT:**

Customer Relationship Management System Pilot

### **SUMMARY:**

In this briefing we will provide an overview of the pilot program for a Contract Management Solution through the Salesforce Platform. For a period of one year, the Information Technology Services Department will work to implement and pilot a contract management solution. The solution will be the single source repository of City contracts and will govern the tracking, monitoring and reporting aspects. The new system will allow departments the ability to track and report on key metrics related to contracts such as time periods, cost, performance and other measures used to determine the level of services being provided by the vendor.

### **BACKGROUND INFORMATION:**

The City of San Antonio has procured licenses through the Salesforce platform and will work to implement a contract management system and conduct an internal pilot to evaluate the system capabilities against business and technical requirements. The pilot term will be for one year and data will be captured throughout the program. The new solution will enable department staff to load and track all types of contracts. The pilot will consist of the development of automated processes within the solution to track workflow, tasks with key dates and responsible parties and location for stored contract documentation, an interface with core City systems such as SAP and FileNet with ability for frequent updates of key data such as contract spends, and review and approval processes and notifications throughout the contract terms. Additionally, the pilot will work towards the

development of standard and ad-hoc reporting capabilities/dashboards for City staff to review City contract data, status and key upcoming tasks. The successful deployment of requested solution would allow for increase in efficiencies as well as customer service.

## **ISSUE:**

The City of San Antonio manages approximately 6,600 active contracts totaling \$4.2 billion across CoSA. Currently, there is no single solution for managing or reporting on City contracts after they are awarded. Additionally, contracts are currently managed by departments in various systems that provide reporting in various formats. Challenges to current state include: a lack of uniformity in contract management and manual and duplicative. In an effort to improve overall City contract management and compliance, the Finance Department consulted with ITSD to implement and pilot a centralized contract management software solution which can be adopted by all departments.

## **ALTERNATIVES:**

This item is for briefing purposes only

## **FISCAL IMPACT:**

This item is for briefing purposes only

## **RECOMMENDATION:**

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