

# Memorandum



CITY OF DALLAS

DATE May 2, 2018

Honorable Members of the Government Performance & Financial Management  
TO Committee: Jennifer S. Gates (Chair), Scott Griggs (Vice Chair), Sandy Greyson,  
Lee M. Kleinman, Philip T. Kingston, Tennell Atkins, Kevin Felder

SUBJECT **Customer Request Management System Update**

On Monday, May 7, 2018, 311 and Communications & Information Services will brief the Government Performance & Financial Management Committee on the implementation project for the new service request software (Customer Request Management System). I have attached the briefing for your review.

Please let me know if you need additional information.

A handwritten signature in blue ink that reads "M. Elizabeth Reich".

M. Elizabeth Reich  
Chief Financial Officer

## Attachment

c: Honorable Mayor and Members of City Council  
T.C. Broadnax, City Manager  
Larry Casto, City Attorney  
Craig D. Kinton, City Auditor  
Billierae Johnson, City Secretary  
Daniel F. Solis, Administrative Judge  
Kimberly Bizer Tolbert, Chief of Staff to the City Manager  
Majed A. Al-Ghafry, Assistant City Manager

Jo M. (Jody) Puckett, Assistant City Manager (Interim)  
Jon Fortune, Assistant City Manager  
Joey Zapata, Assistant City Manager  
Nadia Chandler Hardy, Chief of Community Services  
Raquel Favela, Chief of Economic Development & Neighborhood Services  
Theresa O'Donnell, Chief of Resilience  
Directors and Assistant Directors

# Customer Request Management System Update

**Government Performance & Financial  
Management  
May 7, 2018**

**Margaret Wright, Managing Director  
311 Customer Service Center  
William Finch, CIO  
Communication & Information  
Services**



# Presentation Overview

- Background/History
- Implementation Progress
- Demo



# Background/History

- Customer Request Management System = CRM System
- Documents, routes and tracks 400,000 service requests annually for 311 non-emergency services received by phone, online, or via app
- Current software (Motorola) in use since 2002



# Background/History, cont'd

- 311 Customer Service Center
  - Open 24/7/365
  - Handles over 1 million calls per year (311, Water Customer Service, Court Services, Auto Pound)
  - Dispatches urgent calls for field services for 6 departments
- CRM system administration
  - Configures, routes and reports on 400+ service request types handled by 38 City departments
- GIS mapping of service requests

4



# Salesforce CRM Implementation

- Project kick off 11/13/17
- Steering Committee representation from CMO, CIS, 311, and major user departments (Code, DAS, SAN, PBW, TRN, DWU)
- Project on track for August go-live



# Listening to the Customer

- Held 8 focus groups with residents and staff December-January
  - Facilitated by outside vendor
  - Goal: identify current vs. desired customer experience when interacting with 311 (phone, web, app)
- Captured recommendations across six different areas of service request management:
  - Overall improvement
  - Service request generation
  - Service request fulfillment
  - Monitoring progress
  - Escalation
  - Closure

6



# Sample Recommendations

- Google-like search for service request key words
- Mobile users can create & update service request when connectivity is poor; system stores info and submits when connectivity is restored
- Notification through the life of the SR via preferred method: text, email, phone
- Customers can see other submitted service requests in their area
- Fewer clicks to submit service requests on the web





# Project Milestones Complete

- Reduced number of existing service request (SR) types
  - Example: Code Compliance reduced from 150 to 80 SR types
  - Combine similar types for easier submittal by residents
- City staff trained on system configuration
- Completed setup of 295 SR types (public-facing and internal) for Salesforce configuration

# Project Milestones Complete

- Created project Sharepoint site for status and information communication across City departments
- Reports:
  - 48 standard reports available
  - Custom reports to be built as-needed
- Dashboards



# Project Milestones In Progress

- Integrations with other City systems
  - DALForce—*resident contact information updated in Council's database also available in 311's database*
  - Animal Services (Chameleon)
  - Code Compliance (POSSE)
  - Outlook
  - Active Directory (Network log-in)
  - GIS
  - Socrata/Big Data



# Project Milestones In Progress

- Data migration:
  - 2016-2018 existing SRs moving to new system
  - Closed SRs that have reached retention deadlines to be purged (approximately 3 million records)
- Knowledgebase development
- Mobile app development
- Training development
  - Self-paced and classroom

# Project Milestones Ahead

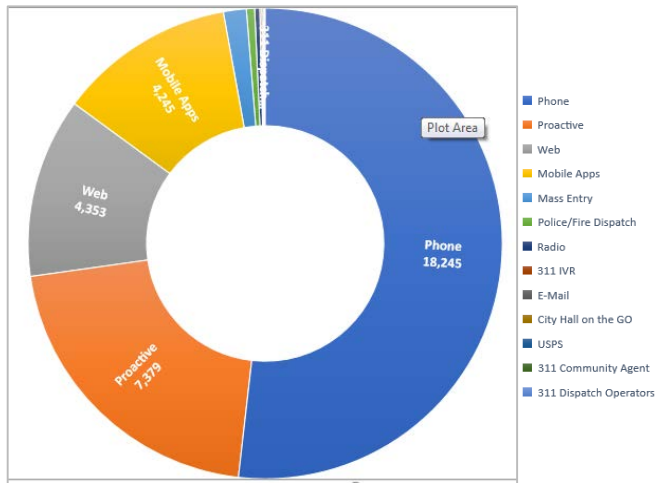
- User Acceptance Testing
- Training roll-out
- Communication plan to public
  - Mobile app
  - New web portal



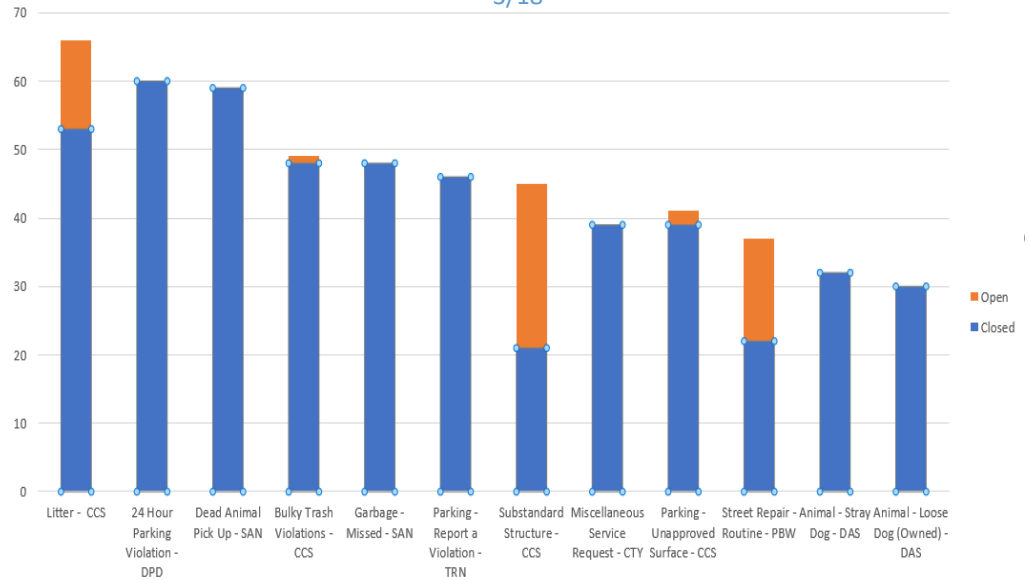
# **Salesforce Test Demo**

# Sample Dashboard/Report

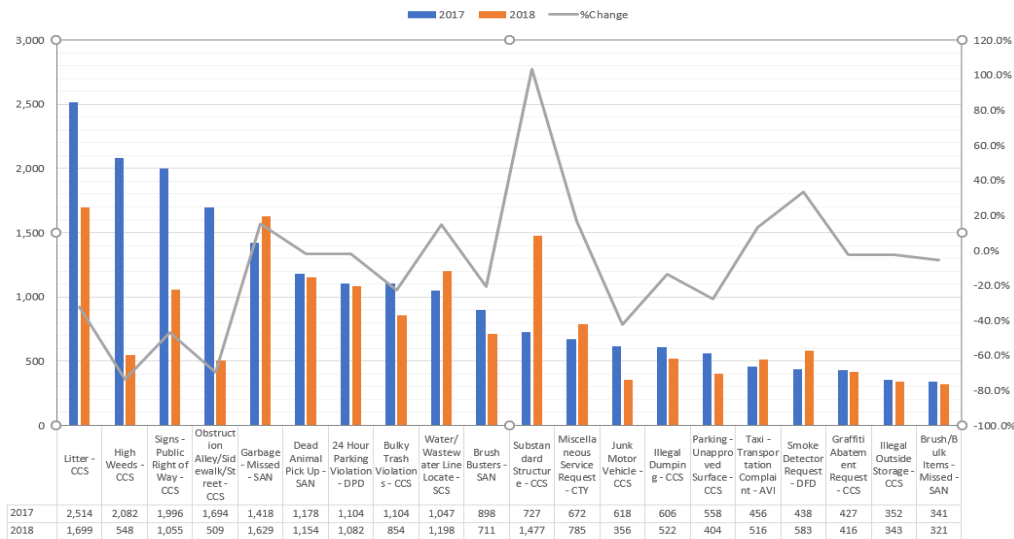
Method Received 3/18



Top 10 SRs in Zip Code 752xx  
3/18



Top 20 SRs  
March 17 vs March 18



# Customer Request Management System Update

**Government Performance & Financial  
Management  
May 7, 2018**

**Margaret Wright, Managing Director  
311 Customer Service Center  
William Finch, CIO  
Communication & Information  
Services**

