



# **Local Government Customer Service and 311/CRM Systems:**

## **What 311/CRM Systems Are and How They Can Benefit Local Governments**

# Local Government Customer Service



Local governments exist to serve the needs of their residents.

Every time local government employees interact with residents, they leave an impression about how taxpayer dollars are working.



## Excellence in local government customer service translates into:

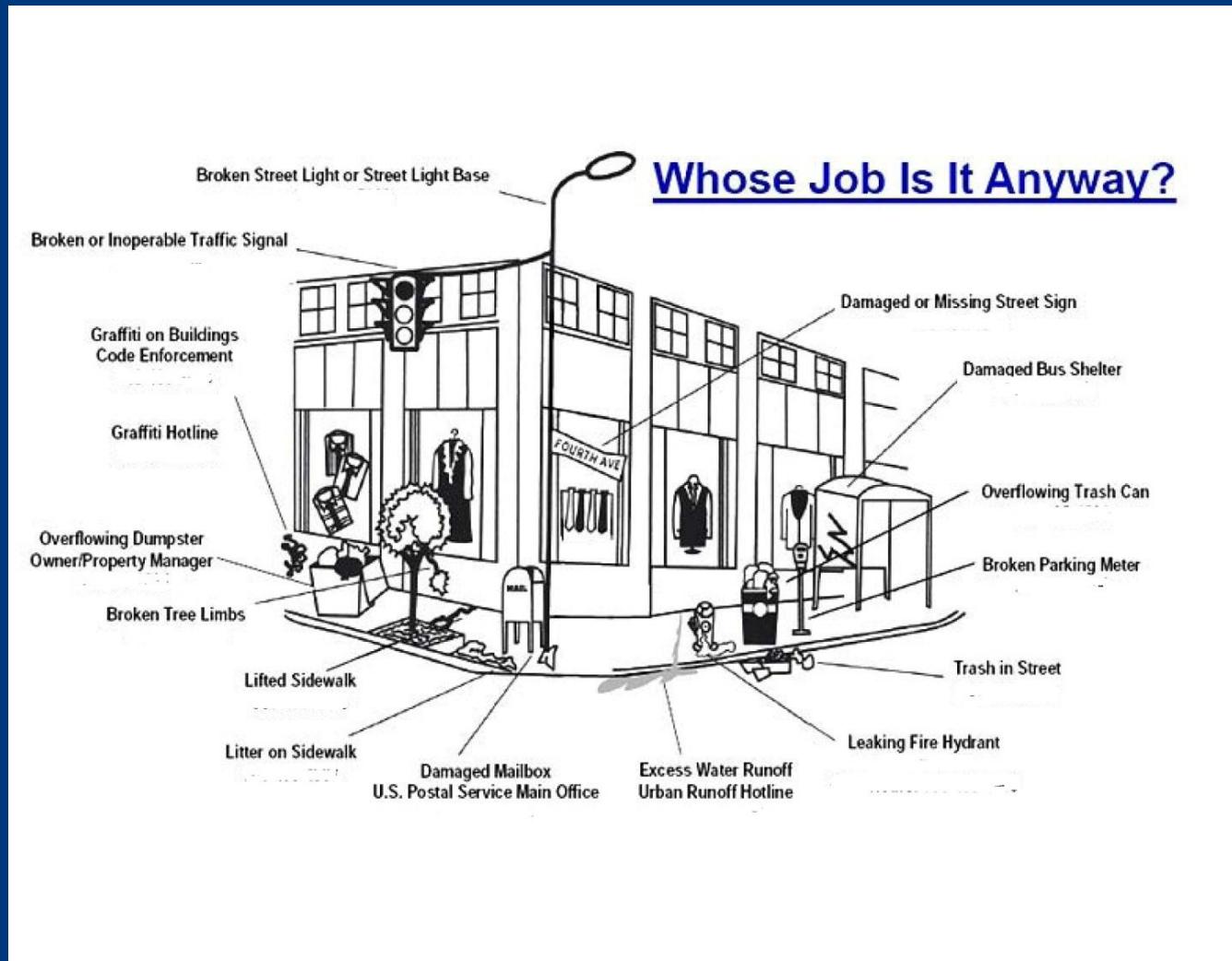
- Greater public confidence & trust
- Support for budgets, zoning changes or other new local government initiatives
- Positive image for community

# Typical Resident Questions



- What hours is the library open?
- Do I need a building permit to put up a tool shed in my backyard?
- How do I appeal my property tax assessment?
- Can I pay my parking ticket with my debit card?
- How can I reserve the shelter at the city park?
- I need to get an absentee ballot. What do I need to do?
- Do you have someone who is a notary on staff?

# Typical Resident Service Requests



# What Is “311”



## N-11 Codes

- **1996 –**  
FCC & Telcos  
create “**N-1-1**”  
numbers.  
  
Originally “Police  
Non-Emergency”
- **Now**  
“City Customer  
Service”
- 011 - International call routing
- 111 - No standard
- 211 - Community-based social services
- **311 - Non-emergency City Services**
- 411 - Telephone directory assistance
- 511 - Traffic and transportation info
- 611 - Telephone repair service
- 711 - TTY (text telephone) access
- 811 - Excavation “call before you dig”
- 911 - Police, fire, and medical  
emergency

# Defining 311/CRM



- 311/CRM used interchangeably, but not one in the same
- 311 refers to the phone number, related call center, and website
- CRM = Customer Relationship Management - is a **system** – people, processes and technology – for connecting governments with constituents

# Key CRM Components



- Knowledgebase
- Service request initiation, routing & tracking
- Constituent data capture
- Call/contact center
- Self-service (online portal / smart phone apps)
- Data integration/Data warehouse software
- Matching and addressing software
- Reporting capabilities
- Business analytics software
- Cashiering
- GIS

# Where are 311/CRM systems?



# Benefits of 311

- **Single 311 number replaces hundreds**
  - Resident requests for services handled with a single call
  - Residents quickly receive answers to the most frequently asked questions
  - Provide residents with consistent info
  - Residents can track the status of their request using the tracking number
- **Government business processes improved**
  - Issue tracking and metric analysis
  - Performance management dashboards show response to residents' concerns



# Benefits of 311

- **311 Call Centers**
  - Augment 911 for non-emergency situations

Before 311, “an estimated 50% to 90% of all calls being made to 911 were for non-emergencies”-according to a U.S News and World Report
  - Support emergency operations during disasters
  - Provide analytical/performance management data

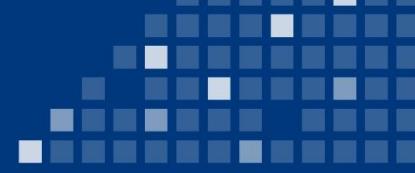


# Benefits to Residents



- Easy to remember number
- Single point of contact and resolution of service request or problem
- Ability to track status of service request
- Managing residents' expectations of when work will be done
- New data for neighborhood and community groups to identify emerging “hot spots” and address issues in an integrated fashion.
- Broadens resident's ability to engage with local government – an equalizer

# How are 311/CRM Systems being used?



- Customer service
- Civic engagement
- Performance measurement and management
- Budgeting and resource allocation
- Disaster response and recovery
- Community and economic development

# Performance measurement and management

- In many cases, local government does not know how many calls it receives for certain services.
- 311 data allows local government to look at requests for different city services, and disaggregate by geography, day, time, and season.
- Repeat calls allows city to begin to identify service gaps.
- Service level agreements (SLAs) measure the % of time residents' requests being completed within a pre-determined timeframe, e.g., *85% of all potholes are fixed within 72 hours.*

# Budgeting & resource allocation



Minneapolis - Staffing for code enforcement

Kansas City – Mowing schedule in parks

Indianapolis – Business licenses & police  
staff time

# Emergency response & recovery

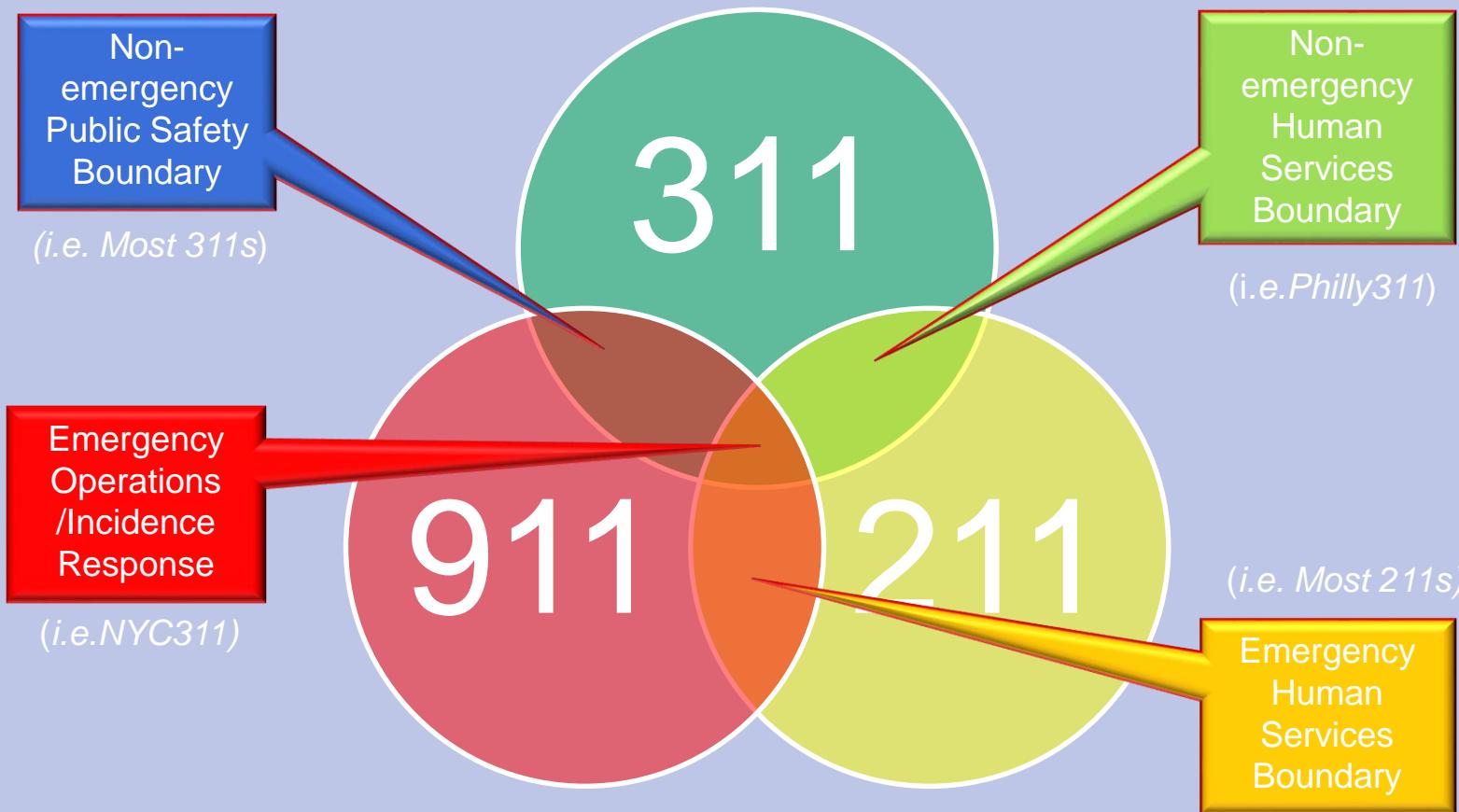


- 311 originally established to off-load non-emergency calls made to 911.
- ICMA series of in-depth case studies revealed 311 can be more proactive:
  - San Antonio – 311 call agent monitors situational awareness
  - Los Alamos County – recovery from wildfires
  - Minneapolis – responding to I35 West bridge collapse
  - Hampton – responding to and recovery from Hurricane Isabel

# 211, 311, 911 Interaction



## Public Safety, Human Services, and Resident Service Meet



# 311 In Emergency Operations

- **As a component of an Emergency Response program, 311 can:**
  - Centralize information for real-time access
  - Handle requests for non-emergency services
  - Pre-configure procedures for 2<sup>nd</sup> responders
  - Bridge multi-departmental and multi-jurisdictional resource coordination and communications
  - Control rumors

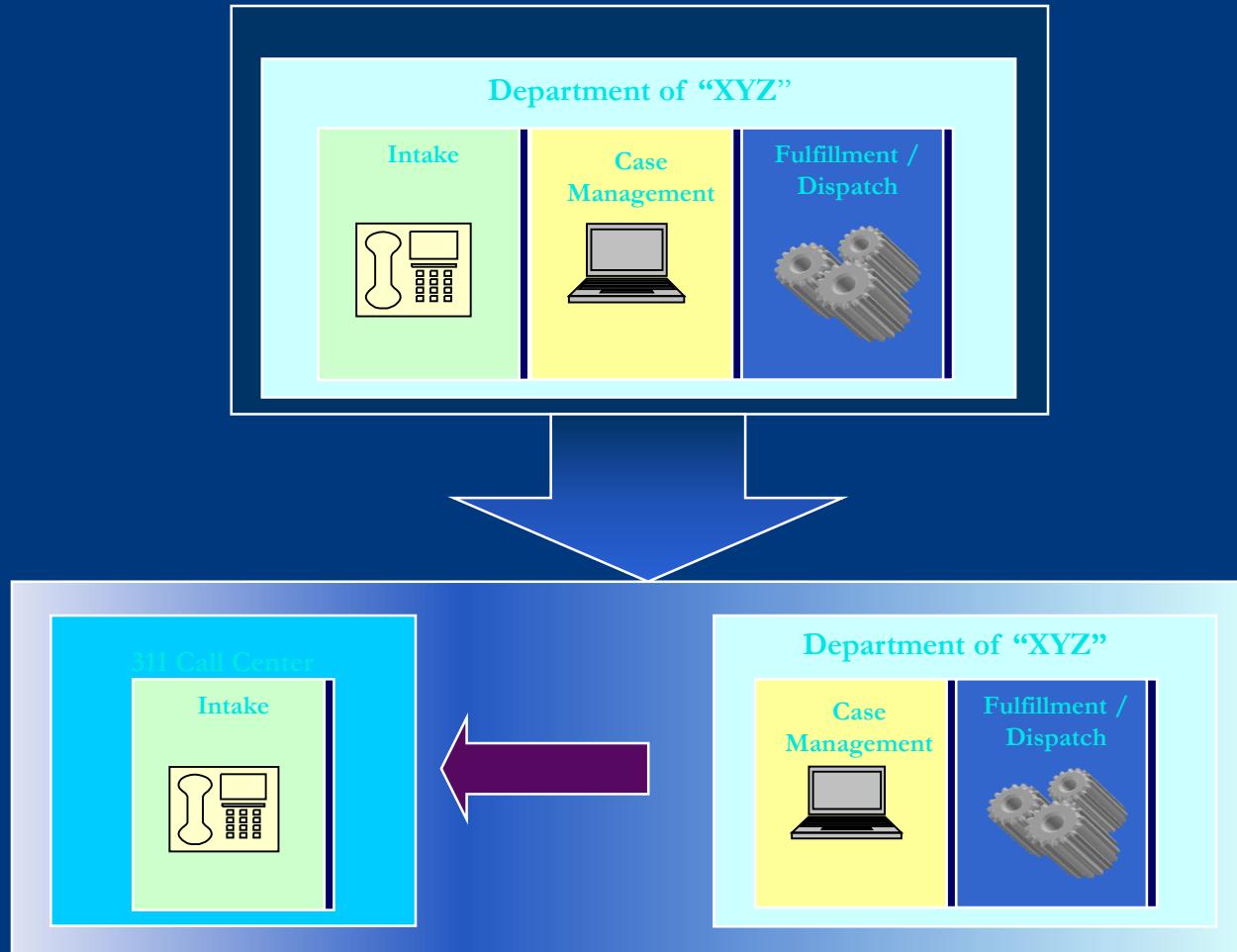


# Example: Minneapolis I-35W Bridge Collapse, August 2007

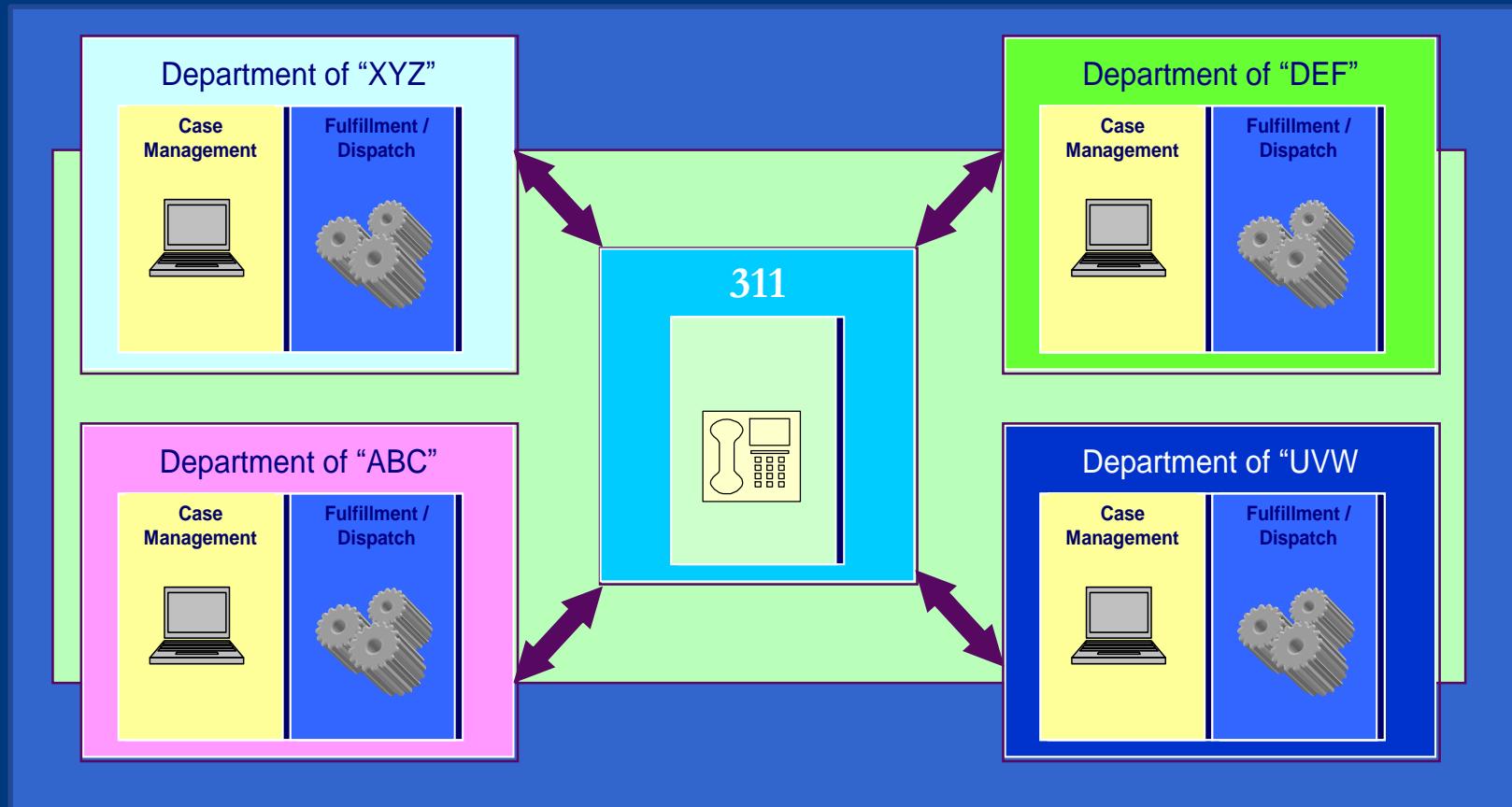
- 311 Contact Center Created Ad Hoc Scripts for Agents
  - General Information/FAQs
    - General public information regarding the bridge collapse
    - Road closure information
    - Alternate route information
    - Information regarding public viewing of site
    - Red Cross referrals
    - Where and how to make charitable contributions
  - Request tracking
    - Media requests
    - Eye witness reports
    - Request for missing person and victim information
    - Request for vehicle and personal property information
    - Tracking and reporting offers for donated services
    - Tracking and reporting services for fees
    - Recording and tracking of condolences
    - Recording and tracking of public opinions
    - Traffic control complaints



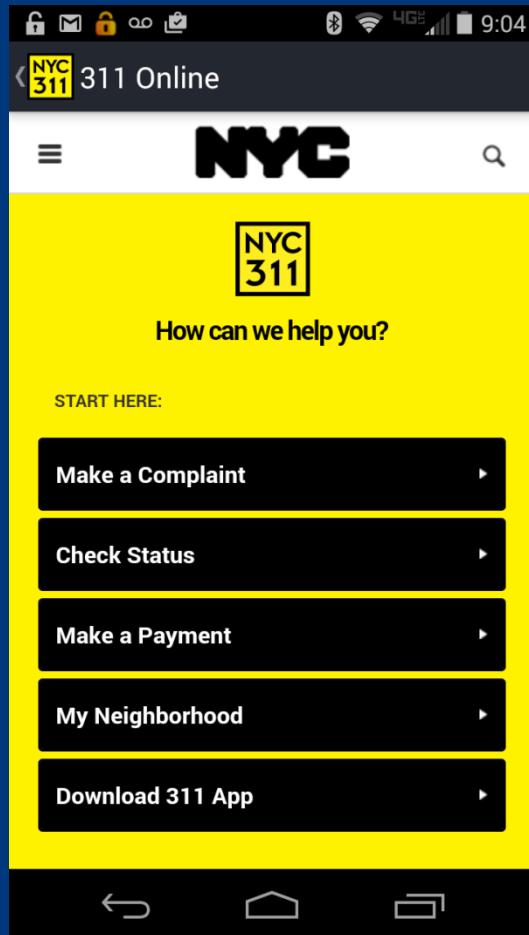
# 311 transform from “Silo”...



# ... to Enterprise CRM



# The CRM System Tracks Resident Requests



- **General Information Calls**
  - Need information to provide accurate answer to caller
- **Referrals**
  - Need to know when to transfer to another department
  - Need to know correct number to transfer to
- **Service Request**
  - Need to know required information (problem, location)
  - Need to know “Probing Questions”
  - Need to know the amount of time department will respond (service level)
- **For All Call Types**
  - Need to know knowledgebase search keywords

# Closing The Loop

Call Type	Call Sub-Type	CS Agent Does:	Fulfilling Dept. Does:
GI	FAQs	✓ Answers Question ✓ Closes Ticket	✓ Does nothing
REF	Directory Assistance	✓ Transfers Call ✓ Close Ticket	✓ Answers transferred call
SR	Complaint	✓ Creates ticket	✓ Follow-ups on complaint ✓ Close ticket
	Compliment	✓ Creates ticket	✓ Acknowledges compliment ✓ Closes ticket
	Request for form/ brochure	✓ Creates ticket	✓ Mails requested form/brochure ✓ Closes ticket
	Service Request	✓ Creates ticket	✓ Dispatches to field ✓ Completes work ✓ Updates/closes ticket

# Getting Started



- **This Project**
  - Implementation road map”
  - Citywide 311 “process model”
  - Staffing model
  - Technology options
  - Facility options
  - Performance benchmarks
  - Implementation rollout alternatives
  - Estimated start-up and operational costs



# June 2019

## *Phase 0*

- *Project Charter Document*
- *Finalized Project Work Plan*
- *Project Meeting/Update Calendar*
- *Project Kick Off Meeting*
- *Surveys Distributed*
  - What are your top 10 FAQ's
  - What are your top ten Service Requests

# June – July 2019



## Phase 1

- *Draft Phase 1 Assessment Report documenting the “Current State” of City of Madison Customer Service, including:*
  - “As-Is” Customer Service Delivery Environment
  - Enterprise View of Customer Service Delivery
  - Customer Contact Volumes
  - City/County/Regional 311 Contact Center Considerations
  - Readiness Considerations
  - Risk Management
  - Other Considerations
- *Final Phase 1 Assessment Report*
- *Updated Phase 2 Envision Work Plan*



## Phase 2

- *Draft Phase 2 Final Report*
  - “To Be State” of City of Madison Customer Service, including: To Be” Customer Service Delivery Recommendation
    - Recommended Customer Service Delivery Business Processes
    - Recommended Customer Service Organization Structure
  - High Level Technology Recommendations
  - City/County/Regional 311 Contact Center Recommendation



- Readiness, Risk Management & Other Considerations
- Readiness Comparison
- Risk Management
- Other Considerations
- *Roadmap and Timeline*
  - *Implementation Project Cost Estimates and Operational Cost Projections.*
  - *Implementation Project Timeline*
- *Final Phase 2 Assessment Report*
- *Final Presentation to Management*

# “Next Steps”



- **Review study**
- **Detailed Planning**
- **Procurement**
- **Functional Design/Build**
  - Detailed Processes
  - Knowledgebase
  - Policies & Procedures
  - Change Management/Communication
  - Training
- **Technical Design/Build**
  - Communications Protocol
  - CRM/ Knowledgebase Configuration
  - Web Portal Configuration
- **Soft Launch**
- **Hard Launch**



# Thank You. Any Questions?



# Contact Information

Cory Fleming, program director  
ICMA 311 and Customer Service Consulting  
[cfleming@icma.org](mailto:cfleming@icma.org)  
202-468-3253 (cell)

James Sullivan – 311 Advocate  
[jsullivan@311call.com](mailto:jsullivan@311call.com)  
917-482-5550 (cell)

# Where are 311/CRM systems?

DISPATCH Monthly - Cities With 311 Service - Windows Internet Explorer

http://www.911dispatch.com/info/311map.html

File Edit View Favorites Tools Help

Favorites 311-CRM Technology 311-CRM Technology for Be... The Business Benefits of GI... GIS Group News LinkedIn City of Westbrook GIS Online File Sharing, Send lar... ICMA Annual Conference 2...

DISPATCH Monthly - Cities With 311 Service

Cities With 311 Non-Emergency Telephone Service



Map Sat Ter Earth

Quebec

Map data ©2011 Google - ©2011 Europa Technologies, INEGI - Terms of Use

View Larger Map

Also check this Harvard University [Web site](#) with a world-wide map of N-1-1 number

Answered

Done

start Internet 100% 11:34 AM