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| Project Name: | hubNashville - Community Response Management (CRM) Program |
| Contact Information: | Lonnell Matthews |
| Category (A,B,C): | B |
| Funding Requested: | \$ 1,628,200 |
| Mayor's Priority Area : | Office of Neighborhoods and Community Engagement |

1. What is the purpose of your PIP proposal?

The purpose of this PIP is to request funding for phase 2 of the hubNashville CRM Program.

Mayor Megan Barry's Office of Neighborhood and Community Engagement created hubNashville in order to better connect Nashvillians with Metro Government and enable them to voice their concerns to the proper agencies and departments who can best help them. The initiative was approved and funded through Mayor Barry's innovative Public Investment Plan (PIP) budgeting process in 2016 (FY17). Phase 1 is planned to go live in the summer of 2017.

Phase 1 of the hubNashville Program provided

- Core Community Response Management (CRM) system functionality for the Mayor's Office, the Council Office and Public Works,
- Citizen Community Portal/Website
- Case Management,
- Mayor's Scheduling,
- Reports and Dashboards,
- Integration with Public Works CityWorks work order system,
- Integration with Outlook for contact center agents,
- Integration with Metro Government's ESRI Mapping platform,
- Open Data feeds of requests and inquiries,
- Single Sign-On for Metro Government employees,
- Knowledge Base for all departments and agencies,
- Customer satisfaction surveys and
- Revamping of the 311 Contact Center.

This Phase 2 proposal is to the following Metro departments with full workflow system integration: Codes, Planning, Water Services: Stormwater and Parks.

Additional functionality to be added in Phase 2 will include an iPhone/Android Mobile Application for Citizens, System integration with the Central Metro Codes CityWorks PLL application, CAD integration for Office of Emergency Management, Text Messaging with contact center agents, Live chat with contact center agents, Social Media integration and Social Media Monitoring.

2. Describe the problem you plan to solve.

Numerous Nashvillians are disconnected from their Metro Government and lack the ability to have their concerns directed to the proper agencies and departments that can best help them. Nashville's population is growing at an estimated average rate of over 80 new residents a day, many of whom are millennials. Metro needs an efficient and responsive program, with appropriate technology as a key component, to effectively provide services and information to an ever-growing, diverse, often tech-savvy population.

Today there is no central location for citizens of Davidson County to understand or access Metro Government services, and the customer service experience provided by Metro departments and agencies is not uniform. The processes we use today to address resident inquiries and requests are not widely viewed as transparent or accountable. Nashvillians are not always informed when a complaint has been resolved or why there is a delay in resolution. Community members currently have to contact various numbers, go to numerous websites or physically go to different Metro departments to report issues or get feedback. The lack of formal processes and transparency has an economic and social impact on the Nashville community.

This problem leads, in many cases, to duplicate work by departments because there is no visibility of the status of cases and a lot of time is spent on internal follow up.

While Phase 1 will be implemented in the summer of 2017, it will provide only core capabilities for a limited number of departments. While this will provide a level of improvement across all departments, for those departments not included in the Phase 1 release it will not provide the same level of feedback, reporting, or accountability.

In Phase 2, by integrating additional departments that frequently interact and engage the public we are increasing uniformity of our constituents' experience. The integration of CAD will help streamline service request calls that may come in after hours or when the contact center is inactive due to inclement weather or emergencies. Also, the additions of features like the smartphone app and social media integration & monitoring will put government at the fingertips of our community. While we anticipated being able to include these smart features in phase 1, we discovered that the cost of these features exceeded our budget during the purchasing process.

3. Describe your proposed solution to the problem.

Our solution is to create a culture within Metro Government where everyone in every Metro Nashville-Davidson County community has a chance to participate in government via a vibrant, centralized constituent support organization, supported by a central Community Response Management (CRM) system. It will also bring Metro into the digital age by making request management and tracking available 24/7/365 through modern digital government tools.

hubNashville will facilitate two-way communication between Nashvillians and their local government, as well as between Metro Departments and agencies, to make responses to issues or queries more efficient, accountable and streamlined. The ultimate goal is to improve the constituent experience to increase confidence in government and administration efficiency/accountability, using the following methods:

- Automated request response and tracking, via the constituents' preferred communication method including:
 - Web-based forms hosted on Nashville.gov
 - Mobile app, on Android and iPhone platforms with photo and GPS-location enabled reporting
 - Social Media (Facebook, Twitter, Instagram, etc.)
 - Text
 - Online chat/Instant messaging

- Email
- Phone call
- Letter
- In person
- Ability to submit requests for services and queries across many departments and agencies.
- Updates for reported issues provided by reporting/tracking number and delivered via text or email.
- Support for multiple languages to reflect the evolving complexion of our citizens and visitors.
- Bi-directional Integration with existing departmental work order systems, enabling departments to respond and track through their own systems/processes but with that data available to hubNashville. hubNashville will interact with existing systems to send requests and capture workflow data.
- Public information sharing to Nashville.gov via metric-based dashboards exposing monitored reports and data trends, to Nashville.gov-based mapped views of data, and to Metro's open data portal
- A searchable and indexed Knowledge Base populated by departments with answers to questions and processes, available from the Hub.

Use Case Example:

A member of the Nashville community will be able to report a pothole by calling the hubNashville Contact Center, using their computer, or mobile device. Once the issue is entered into the hubNashville CRM, the submitter will receive a case number and continuous updates regarding the reported issue, until the issue has been resolved. Once resolved, they will receive communications about the issue and resolution, as well as a customer satisfaction survey to measure performance.

4. Describe the market for your proposed solution (Size of Impact).

hubNashville is expected to impact all 680,000 residents as well as an increasing number of visitors to Nashville and Davidson County. The impact will be immediate, including the economic impact, as the Nashville community will have access to formal processes and communication channels to engage with Metro departments. Community members are part of the current Engagement Steering Committee.

Internal Partners:

- Mayor's Office of Neighborhoods and Community Engagement
- Metro Council Office
- Metro Departments and Agencies (Phase 1 – Public Works, Phase 2 – Codes, Planning, Stormwater and Parks)
- Information Technology Services Department

External Partners:

- Metro's residents
- Community leaders
- Selected CRM vendor (Salesforce/Vertiba/Presidio)
- Project Manager
- Change Management Lead
- School of Science and Math at Vanderbilt

5. Describe how your proposal works.

The discovery phase of the project included in depth research and analysis of various cities (Washington DC, Boston, Denver, Minneapolis, Memphis, Chattanooga, Philadelphia, Miami and Knoxville) that have implemented a CRM application as well as through the International City/County Management Association and Gartner, Inc. This information was used to identify and document best practices for the hubNashville project.

Focused effort has been placed on developing the operational model for a professional municipal non-emergency contact center. The team has also toured and researched the work of existing call centers within the Metro Government: Nashville Electric Service, Metro Transit Authority, Water Services, and the ITS Service Desk. The basis for the hubNashville contact center exists in the existing Public Works call center, but every aspect of operation is under review and examination based on best practices. This includes hours of operation, standard operating procedures, staffing model, performance measures, agent training programs, HR considerations, and many more items critical to efficient operations.

From a technology perspective, the Salesforce CRM application will be implemented to include the functionality as described in #3 above. The implementation and configuration of the Salesforce application will be managed by Vertiba.

The project will include integrations with departmental applications, to include CityWorks AMS (Public Works Phase 1), GIS, Socrata, Service Portal, Open Data, CityWorks PLL (Codes, Planning Phase 2), CityWorks AMS (Stormwater Phase 2), Parks department application.

To allow for modern call management by agents, including pulling up a resident’s record automatically based on phone number calling, telephony integration with Metro’s enterprise Cisco call management systems will be managed by Metro telephony vendor Presidio.

Phase 1: internal soft launch is scheduled for May 2017 and public launch is scheduled for July/August 2017.
Phase 2: Scheduled for Fiscal 2018, to be determined following project launch.

Once implemented and mature, hubNashville will be expected to evolve into its own department in a future phase.

6. Describe your proposal’s business or financial model. Include dollars requested, total cost, budget estimates by category (capital, operations, staff, etc.), financial/in-kind contributions from partners, and recurring costs.

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| Capital Request | | |
| - Software Licensing & Mobility | - \$ | 381,300 |
| - Consulting (Implementation, Project Management & Change Management) | - \$ | 1,058,900 |
| - Resources (6 x Interns) | - \$ | 96,000 |
| - Hardware Upgrade | - \$ | 24,000 |
| - Call Center Furniture | - \$ | 68,000 |
| GRAND TOTAL | | - \$ <u>1,628,200</u> |

Other resource contributions will come from internal Metro resources from ITS, Public Works and the Metro departments and agencies that are fielding and managing the issues that are taken in.

7. Describe your proposal’s impact or return on investment for Nashville.

hubNashville will provide a number of service improvements and service efficiencies which will have financial implications and cost savings by:

- Improving communications and the quality of service to constituents and allowing for more public access and input
- Providing the opportunity for departments to streamline, standardize and improve internal processes and government accountability
- Avoiding duplication of work efforts by preventing multiple responses to the same service request
- Reducing the time for employees to complete service requests
- Collecting and analyzing data will help to identify and prioritize the services and processes in need of efficiency improvements
- Providing robust information to strengthen future planning and funding decisions

The discovery phase of the project included research and analysis of various cities and metropolitan areas who have implemented a CRM application. Cities included Washington DC, Denver and Philadelphia.

8. Describe your team's experience and management plan for the proposal.

The hubNashville project team has been working collaboratively with the vendors and Metro departments over the last 7 months to implement Phase 1 of the CRM system, including Project Management, Requirements Gathering, Solution Design, Testing, Training and Go-Live implementation.

It is important to note that in addition to the wealth of IT and project experience on our team, we also have a great deal of constituent service experience. Erin Williams has provided constituent services under three Mayoral administrations for 15 years. Also, Lonnell Matthews, Keith Durbin and Mike Jameson are all former Metro Councilmembers.

Executive Sponsor – Lonnell Matthews, Mayor’s Office of Neighborhoods and Community Engagement and former 2-term Metro Council Member

Project Team Members – all with many years of technical, operational, project management, and business analysis experience :

- Keith Durbin - Technical Sponsor, CIO and ITS Department Head
- Erin Williams – Mayor’s Office of Neighborhoods and Community Engagement
- Stephanie McCullough – Mayor’s Office
- Mike Jameson – Council Office Legal Counsel and Former 2-term Metro Council Member
- Vanessa Murillo – Council Office
- Mark Sturtevant – Public Works, Mayor’s Director of Infrastructure and Interim Director of Metro Public Works
- Sharon Smith – Public Works (311 Contact Center)
- Stacy Jones – Public Works (311 Contact Center)
- Alexis Gorden – Project Manager
- Cindy Boyer – Business Analyst / Test and Training Lead
- Ed Geldenhuys – ITS Lead
- Rhonda Ammerman – ITS Lead, Call Center specialist
- Departmental Subject Matter Experts
- 58 Departments and Agencies are contributing to the Knowledge Base of hubNashville during all phases of the project.

Project Team Organizations

- Salesforce – industry leader in the CRM applications arena according to Gartner, Inc.
- Vertiba – implemented over 100 Salesforce CRM applications
- Presidio – built over 100 Salesforce CRM Contact center Connectors

Community Engagement Steering Committee:

- Frank Trew, Davidson County Resident
- Ruby Baker, Davidson County Resident
- Sri Pallavaram , Davidson County Resident
- Nancy Van Reece, Metro Council Member
- Jim Shulman, Metro Council Member
- Lonnell Matthews
- Erin Williams
- Mike Jameson
- Mark Sturtevant
- Sharon Smith
- Stacy McCoy-Jones
- Keith Durbin

Phase 2 will also include project members from the Codes, Planning, Water Services: Stormwater and Parks departments.

9. Describe your proposal's launch plan and timeline for implementation.

Phase 1 – Go Live in July/August 2017 with the Mayor’s Office, Council Office, Public Works and Community and will include:

- **Citizen Community Portal/Website** – the community will have access to the hubNashville portal where they will be able to open cases, view cases, access knowledge base articles and interact with Metro departments
- **Salesforce Application** – this is the core enterprise application
- **Case Management** – cases will be opened, updated, transferred, managed and closed utilizing the hubNashville application
- **Mayor’s Scheduling** – this integrated module will replace the current applications in use to manage the mayor’s schedule
- **Reports and Dashboards** – will be available and customizable to the needs of users. The Mayor’s office, Council office and departments will be able to access multiple reports and dashboards which will offer visibility and improve efficiencies
- **Customer Surveys** – every case which is closed, will have a link to a customer survey to enable the community to give feedback on the service they received from the Metro departments
- **Public Works Cityworks Integration** – hubNashville will integrate with the Public Works Cityworks AMS (Asset Management System) application to open requests and work orders
- **Outlook Integration for Cases** – will enable Metro employee CRM users to see cases and statuses in their Outlook e-mail
- **ESRI Mapping Integration** – the ESRI maps will be available to the 311 Contact Center agents and the community to see relevant data on a map, ie. the closest police station to your location. The ESRI map integration will also allow for future functionality on the mobile app – a community member will be able to take a picture of a pothole to be reported and the mobile app will automatically pick up the location to report on the case
- **Open Data feeds of requests and inquiries**– approved data sets will be published to the Open Data portal
- **Single Sign-On for Metro Employees** – employee network credentials will give them automatic access to hubNashville
- **Knowledge Base** – all 58 departments and agencies will contribute immediately to the hubNashville Knowledge Base which will enable the 311 Contact Center agents, other Metro departments and the community to have access to information
- **Revamped 311 Contact Center** – the current 311 Contact Center at Public Works will be revamped and the agents will use the Salesforce application, integrated with the Cisco telephone system to connect with the community and Metro departments

Phase 2 – Proposed Go Live – TBD Fiscal 2018 - with departments Codes, Planning, Stormwater, Parks and to include:

- **Mobile App in Android and iPhone for Residents** – the mobile app will allow the community to access hubNashville via their mobile devices to report issues, open cases and get updates on existing cases. The ESRI map integration will also allow for a community member to take a picture of an issue to report (example: a pothole) and the mobile app will automatically pick up the location to report on the case
- **Text Messaging with Contact Center agents** – an additional form of communication between the community and Metro
- **Live Chat with Contact Center agents** – the chat functionality will allow bi-directional communications via a chat window between the community and Metro
- **Social Media interface with Facebook, Twitter, etc.** – hubNashville will interface with Metro media platforms
- **Social Monitoring** – triggers and tracking of popular topics that are trending on social media
- **Cityworks PLL Integration** (Codes, Planning, Stormwater) – hubNashville will integrate with the CityWorks PLL (Permitting, Licensing and Land) application in use at Codes and Planning department. The system

will also integrate with the CityWorks AMS (Asset Management System) application in use at Stormwater. An integration will also be built for the Parks department application

- **CAD Integration for Office of Emergency Management** – integrate with calls coming into the CAD system
- **Sustainability Contract** (Vertiba On Demand) – Metro will have a support and maintenance agreement with Salesforce and Presidio, as well as a support agreement with Vertiba for minor development requirements

10. Describe your sustainability plan—how will your PIP continue after PIP funding is exhausted?

The application is hosted by Salesforce and supported by contracts with Vertiba and Presidio as well as ITS and hubNashville departmental resources. Metro have maintenance and support agreements with Salesforce, Vertiba and Presidio.

Funding for future phases will be requested through future PIP proposals by the hubNashville team, and will be incorporated into Metro’s operating budget after the first year of implementation.

Should Phase 2 of the PIP not be funded, ITS has requested funding in the FY18 budget for the operating and licensing costs associated with the maintenance and support agreements mentioned above as is standard Metro practice for enterprise-wide applications. Functionality for the Phase 1 departments will remain frozen at Phase 1 levels until further capital funding is provided to expand operations.