Customer Relationship Management Software Contract

PRESENTED TO THE CITY COUNCIL ON

SEPTEMBER 6, 2022

Customer Relationship Management (CRM) Software

The Goal of Burleson 311

* Unofficial 311 BTX Logo
  For Visual Purposes Only

- To be innovative and intentional in making customer service a priority for citizens and stakeholders of Burleson

- To make contacting and engaging with the City of Burleson simple, easy and effective

- To streamline service request intake and give citizens a single point of entry to access city services and information

- To streamline service delivery while improving resource allocation, performance, accountability and cost savings

DIAL

311

BTX

Customer Relationship Management (CRM) Software

Timeline

- Request for Proposal - April 22, 2022
- Submissions (12)
- Evaluation Team Scores
  - Vendor Qualifications
  - Appropriate Application
  - Software Functionality
  - Price
  - Implementation Methodology
  - Support and Training
- Top Three Proposals Demonstrations
- Final Scoring and Selection

Customer Relationship Management (CRM) Software

Features/Benefits

- Value to Citizens
    - Simple Number to Call for Everything
    - Comprehensive Online Portal
    - Organized Personal Profile
    - Easy Mobile Access
    - Real Time Request Tracking
    - Searchable Knowledge Base
    - Extensive Intuitive Database
    - Dynamic Alerts and Updates
    - Phone, Email, Text and App to Case
    - Information in Emergency Situations
    - Future Growth and Tech Capable

Easy, Effective, Innovative, Engaging, Fun and Very Customer Friendly!
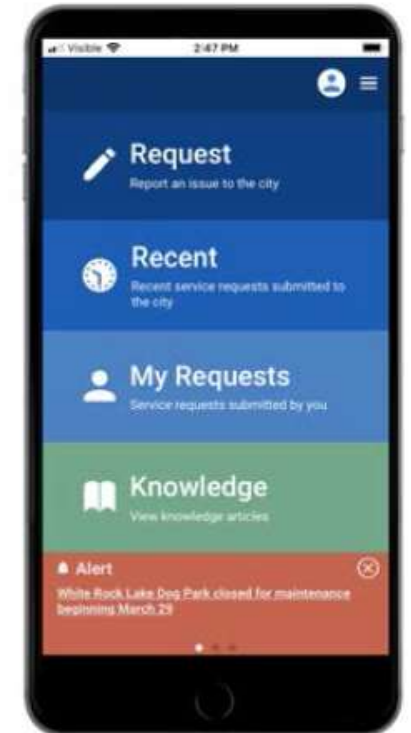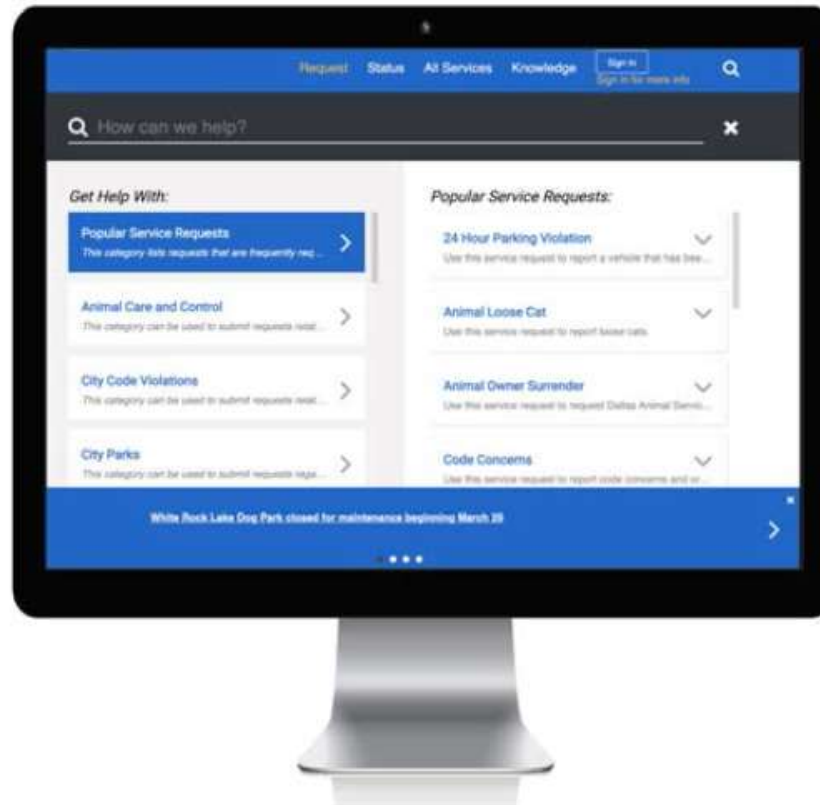
Customer Relationship Management (CRM) Software

Features/Benefits

- Value to Organization and Staff
  - Extensive Data Collection
  - Service Request Integration
  - Streamlining Information
  - Knowledge Base Organization
  - Search and Request Tracking
  - Full GIS Location Mapping
  - Resource Management/Allocation
  - Service Level Agreement Reporting
  - Emergency Management Support
  - Marketing and Promotion Support
  - Data Driving Decision Making
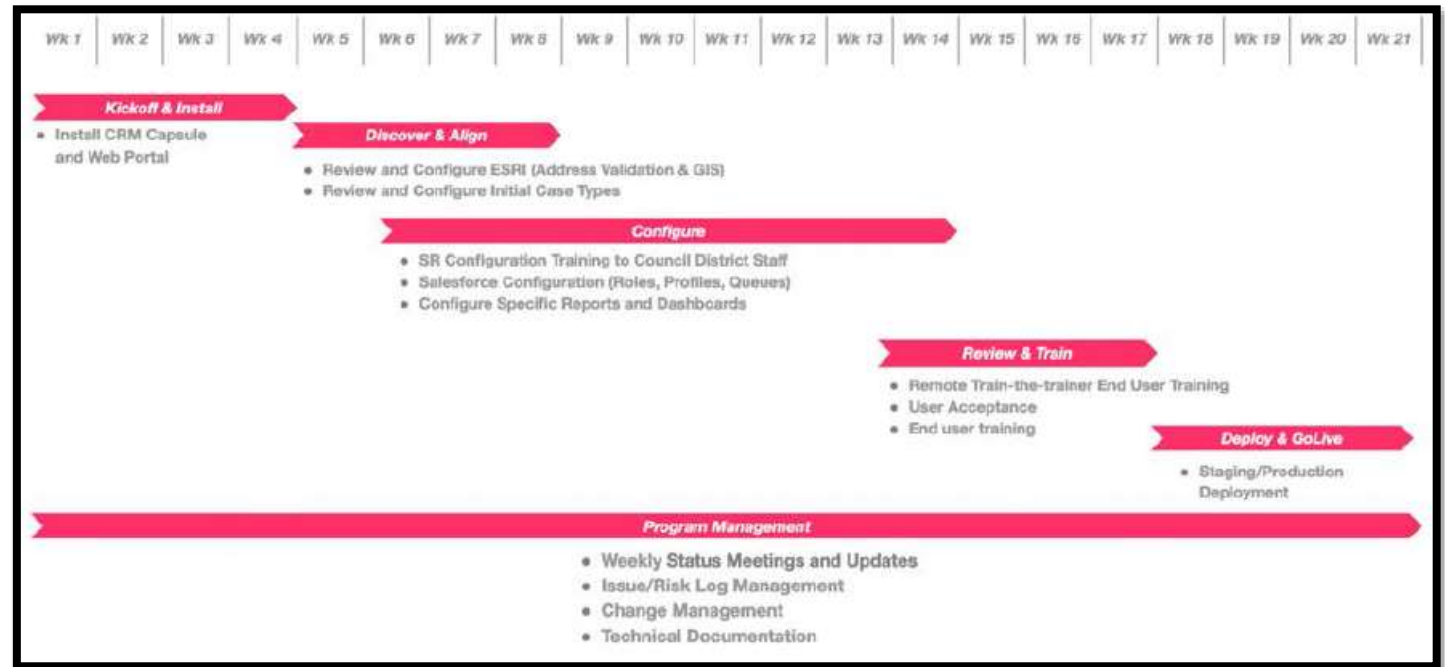 - More Efficient and Faster Service
  - Cost Savings

  Data Drives Excellence in Service!
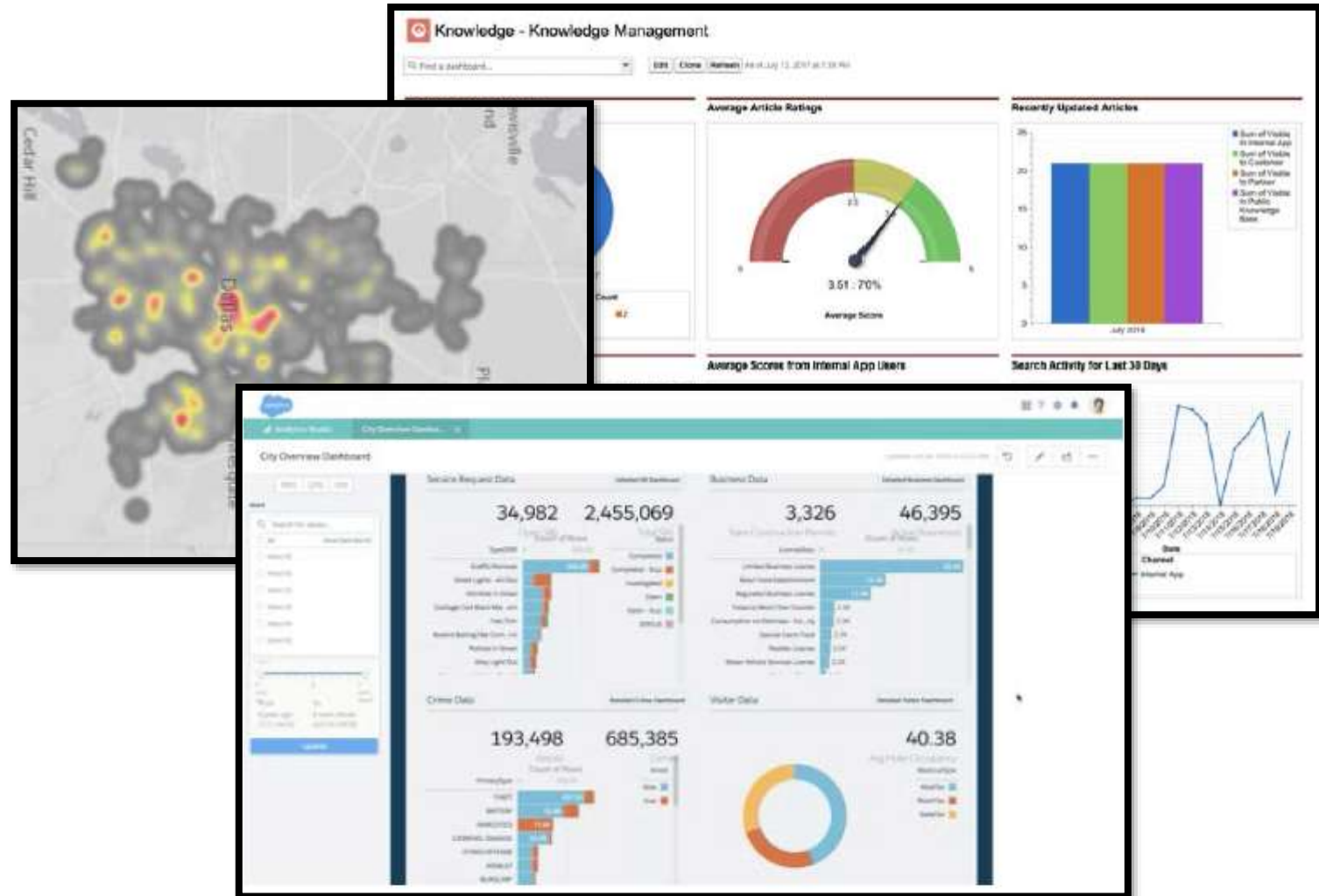
Customer Relationship Management (CRM) Software

Next Steps
- Purchase and Installation
- Discovery and Alignments
- Populate and Configure
- Integrations
- Structure and Design
- Trial and Testing
- Training
- Staging and Production
- Go Live

Cost Breakdown
Year 1: $362,061 (all software, licenses, implementation, training and support)
Year 2: $ 98,605 (ongoing maintenance, licenses, training and support)
Year 3: $100,235 (ongoing maintenance, licenses, training and support)
Year 4: $101,922 (ongoing maintenance, licenses, training and support)
Year 5: $103,669 (ongoing maintenance, licenses, training and support)
* 3.5% escalation build in year over year

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Council Action Requested:

1. Approve the contract with Incapsulate Salesforce Solutions.

2. Deny the Contract.

Questions or Comments?