



AGENDA MEMORANDUM

First Reading for the City Council Meeting of June 22, 2021
Second Reading for the City Council Meeting of June 29, 2021

DATE: June 22, 2021

TO: Peter Zanoni, City Manager

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Customer Relationship Management System for 311
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CAPTION:

Ordinance authorizing a five-year subscription agreement with the option to extend for three additional years with Incapsulate, LLC in an amount of \$2,223,569.63 for Customer Relationship Management System (CRMS) for 311, effective upon issuance of a notice to proceed, appropriating \$622,461.64, from the unreserved fund balance of the Information Technology Fund and amending the FY 2021 operating budget to increase expenditures.

SUMMARY:

The City would like to implement a Customer Relationship Management (CRM) software application which enables the Call Center to process phone calls more efficiently. The CRM will allow for a centralized information system with real-time integrations with all City applications and the implementation includes a virtual agent, chat option, knowledge base, web portal and mobile application.

BACKGROUND AND FINDINGS:

Today, the City's Call Center takes an average of 1,300 calls per day. Currently, call takers must monitor and enter data into multiple software applications to submit work

orders, research information and communicate with departments. The City is also in the process of implementing a 311. With the implementation of a 311, the Call Center needs a centralized Customer Relationship Management (CRM) software application that allows the Call Center to manage daily workload in one location.

The IT, Communications and Procurement Departments developed and submitted for proposals an RFP with a list of requirements necessary for a successful CRM for the City of Corpus Christi. The CRM will allow for real-time integrations with all City applications, which include, Maximo, Chameleon, INFOR, ESRI ArcGIS, Active Directory, and Cisco Call Manager and Contact Center. This software implementation will allow Call Takers to be more efficient and process phone calls and answer questions more quickly since information will be gathered in a central location, rather than having to look in multiple places for answers and information.

The CRM implementation will also include a new mobile application, Virtual agent, chat option, knowledge base and a web portal which allows residents to login, initialize or lookup service request tickets to see in real-time the status of their work orders.

After proposals were received, a committee performed three software evaluations and the Committee ranked Incapsulate, LLC as the highest-ranking firm.

PROCUREMENT DETAIL:

Contracts and Procurement conducted a competitive Request for Proposals process to obtain proposals for qualified firms to provide a Customer Relationship Management (CRMS) System for 311. The evaluation committee included City Staff from the Call Center, and IT Department. The City received 10 proposals and evaluated them against the published criteria. The City considered three firms as finalists, demonstrations were conducted, and pricing was evaluated. The final scores were tabulated for each firm to determine the highest-ranking firm offering the best value to the City. Staff is recommending award to Incapsulate, LLC as the highest-ranking firm.

ALTERNATIVES:

Continue to do business as we do today, using multiple software applications and platforms.

FISCAL IMPACT:

The fiscal impact in FY 2020-2021 is an appropriation of \$622,461.64, from the unreserved fund balance of the Information Technology Fund with the remaining cost of \$1,601,107.99 budgeted in future years through the annual budget process. The Information Technology fund is expected to have a fund balance of \$3.3 Million after this appropriation at the end of FY2020-2021.

FUNDING DETAIL:

Fund:	5210	Information Technology
Organization/Activity:	N/A	
Mission Element:	N/A	

Project # (CIP Only):

Account: 251850

Unreserved Fund Balance

RECOMMENDATION:

Staff recommends approval of this ordinance authorizing a five-year subscription agreement with the option to extend for three additional years with Incapsulate, LLC.

LIST OF SUPPORTING DOCUMENTS:

Evaluation Matrix
Subscription Agreement
Ordinance