Customer Relationship Management (CRM) Training

City of Longview

What is CRM and why is it needed?

- What is CRM?
  - CRM stands for…
    - Citizen or Customer Relationship Management
    - Citizen Request Management System
  - 2 Components
    - Knowledge Database of FAQs
    - Virtual City Hall for Requests
  - Web based system – browser
- Why is the City of Longview deploying this system?
  - Ensures reliable communication between citizen and employee
  - Quicker response time to requests and complaints from citizens
  - Easy to track large volumes of requests in fewer working hours
  - Allows the Citizen to hold City Hall accountable

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Agenda

- Quick overview of system
- How to access and use the system
- Emails from the system
- Finding information in the system
- Reporting
- Help

Quick Overview of Knowledgebase and CRM

- Citizen will search knowledge base online (web)
- Citizen will file a request on-line
- Employee (or Council) will process the request
- Citizen views resolution and fills out survey

User Management

City Employee Sign-in

User name: mary
Password: ••••
☐ Remember me

Password assistance?

[Sign-in]

Forget your user name or password?
Enter your email address below and we will email you your sign-in information.

Email address: kendall@govoutreach.com

[Send me my sign-in information] [Cancel]

- "Remember me" check box
    ⇨ Remembers your User name and Password
- Where is the system?
    ⇨ **http://User.GovOutreach.com/Longview/Employee**
- Sign-In names and Passwords
    ⇨ Send email to: Support@GovOutreach.com
    ⇨ Include your name, phone and department

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The Request Log

Commands

Request Log

View FAQs | New Request | Reports

Welcome **Kendall**
[Sign Out, My Account]

View Requests: Assigned to you | **All**

Quick find: [ ] [Go] [Advanced Find]

Show: **Open Only** | Open & Closed

3 Records

Request #	Topic	Status	Date Entered	Expected Close	Assigned To	Request By
56855	Excessive Noise - Barking dog, rooster Open **Location:** 2405 PACIFIC AV *The owner has a rooster in his backyard and it wakes me up every morning. Please help and do something about it.*		04/13/2007	04/27/2007	Ramirez,Tom	Smith,Kendall
56431	Animal Bites **Location:** 2405 PACIFIC AV *A dog bit me at this address*	Open	04/10/2007	04/24/2007	Ramirez,Tom	Jones,George
47981	Abandoned or Inoperable Vehicle **Location:** 2405 PACIFIC AV *There is an old car that has not moved for weeks at this location.*	Open	01/23/2007	02/06/2007	Adams,Mickey	Anonymous

3 Records

Search

Display Filters

Account Management

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Assigned to me

New Request

Edit/Add Request

Update & Exit | Update | Cancel

New Request   ● Short form ○ Long form

Customer Information (☐ **Check for Anonymous Citizen. Leave Fields Blank for Kendall Smith)** (1 other request for customer)

Last name: Green   First name: Jack   Phone: 925-872-3365   Alt phone: Email: jack.green@yahoo.com

Address: City: Thornton   State: CO   Zip code: ☐ Phone when done

Request Classification

* Topic: Accumulation of Junk and Litter ▾

Request type: Problem ▾

Entered via: Phone ▾

Address or Location: ☐ Same as customer

FAQ for Topic

Properties must be maintained free of junk, litter, trash, garbage and refuse. This includes but is not limited to unusable appliances and machinery, salvage and scrap materials, boxes, bottles, cans, used tires, plant and tree trimmings, used building materials and used motor vehicle parts. To report an accumulation of junk and litter call 303-538-7517.

* Description: 0 Attachments to this Request

This field is used to describe the problem or question. Customer will see this field.
                 There is junk and litter everywhere in my neighbors yard.

Update & Exit | Update | Cancel

Customer Information area

Problem Details area

FAQ and Problem Description area

Council can file a request or have someone file on their behalf.

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Existing Request

- How do I know I have something to do?

Council can answer requests assigned to them.

- Working on an existing request…
  - Add any additional missing information
  - Re-assign
  - Reason Closed
    - Insert reason
  - Adding Information to the Request
  - Getting more Information from the Citizen
    - Calling
    - E Mail – Insert message
  - Update Request – you're done!

New Request Notification

CRM: You have been assigned a new Request #: 44529 - Message (HTML)

File   Edit   View   Insert   Format   Tools   Actions   Help

Type a question for help

Reply | Reply to All | Forward | ✕ »

Add Email Add Case

Do NOT Forward emails to others

From: City Help Line [noreply@user.govoutreach.com]   Sent: Wed 12/6/2006 3:28 PM
To: Kendall@GovOutreach.com
Cc:
Subject: CRM: You have been assigned a new Request #: 44529

Request # 44529 from the Government Outreach System has been assigned to you.

Request type: Problem

Request area: Abandoned Vehicle

Citizen name: Jack Green

Description: There is an old car that has not moved for weeks at this location.

Expected Close Date: 12/20/2006

Click here to access the request

Note: This message is for notification purposes only. Please do not reply to this email. Email replies are not monitored and will be ignored.

Opening an Existing Request

Edit/Add Request   Update & Exit   Update   Cancel   Print   Audit Trail

Assigned to: Tami Nielsen   **Request:** 11   **Entered on:** 04/01/2009 2:33 PM   **By:** Kendall Smith   ⦿ Short form   ○ Long form

Customer Information   Create another request for customer   *(1 other request for customer)*

Last name: Green   First name: Jack   Phone: 925-872-3365   Alt phone: Email: jack.green@yahoo.com

Address: City: Thornton   State: CO   Zip code: ☐ Phone when done

Request Classification

* Topic: Accumulation of Junk and Litter

Request type: Problem

Entered via: Phone

Address or Location: ☐ Same as customer

* Description: 0 Attachments to this Request

This field is used to describe the problem or question. Customer will see this field.

There is junk and litter everywhere in my neighbors yard.

ABC✓

Reason Closed (Contents sent to customer):   0 Attachments to send

This must be filled in to close service request; contents of field are e-mailed for customer notification.

Reason Closed area

ABC✓

Expected Close Date: 04/15/2009   *Leave blank for automatic calculation*   Insert Reason Closed: (Select message from list)

Update & Exit   Update   Cancel

(OPTIONAL) You may add an internal note to this request or send an email

ABC✓   Add your notes/message here: Insert message: (Select message from list)

Email Customer   Clarification/notification needed; message sent to customer

Add Internal Note   Content added as internal notation; not seen by customer

Email Employee(s)...   Send to other employee(s) for assistance/questions

Spell Check buttons

- **Customer**
- **Employee Collaboration**
- **Internal Note area**

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Request Management cont…

- Update Request…
  - Where did it go?
    - Still Open
    - Closed
- Reasons and Messages
  - System and Creating my own
- Printing

Other Emails and Events

- Emails
  - Due tomorrow
  - Due today
  - 7 days late
  - 10 days late
  - Additional information from customer
  - Message from other employees
  - More…
- Can I delete them?

Account Management

- "My Account" link
  - Username, password, email address
  - Going on vacation…

First Name:	Kendall
Last Name:	Smith
Phone Number:	(925) 292-2768
Alternate Phone Number:	
Email Address:	kendall@govoutreach.com
Job Title:	CRM Vendor
Delegate Requests To:	(No delegation)
Sign In Name:	kendall
Password:	
Confirm Password:	

Send   Cancel

Finding Requests and Using Reports

- Quick Find
  - What fields does it search on?
- Advanced Find
  - Multiple Select
- Reports
  - System
  - My own
  - Scheduled Reports

Help

- Upper right hand corner

Questions?