# City Relationship Management (CRM) System Talking Points

**Tech Executive Leadership Initiative**

**Background:** This project proposes that the City of Foggyton's Digital Services (FDS) team develop a centralized digital directory of small businesses, or a "City Relationship Manager" (CRM) portal that includes basic data on small businesses such as owner, address, and type of business. The system, which would be internal to city government and accessible to all city agencies, would both support distributing COVID-19 relief and standardized data collection systems for small business forms like grant and permit applications.

To create a CRM system, FDS would need to convince city agencies to retire existing application systems that rely on self-contained databases. This document provides draft talking points to the FDS team to convince city agencies to participate in a new CRM system. In addition to utilizing these talking points, FDS should identify at least one critical pain point per agency that a CRM would alleviate prior to approaching an agency.

### What is a City Relationship Management (CRM)?

- A City Relationship Manager (CRM) is a centralized digital directory of small businesses that is internal to Foggyton's government. It is accessible to all city agencies, and includes basic data such as business owner, address, and type of business.

  - For instance, a business located in the City of Foggyton would have a record in the CRM system with data including: Business Name, Owner, Address, Primary Contact, and Type of Business (Retail, Restaurant, Florist, etc.).

- The CRM is modeled after Customer Relationship Management tools from the private sector.

### Why should the City of Foggyton implement a CRM?

- A CRM system will allow the City, and each of its agencies, to have a single place to view all information about a business.

- The system will lay the foundation for more robust and effective digital interactions with businesses and citizens. For example:

  - If FDS had had these data prior to the COVID-19 crisis, it would have been able to proactively match businesses to relief opportunities. The City could have emailed or texted business owners with information on the grants for which they qualified, along with a link to start the application process.

  - If a Foggyton city agency would like to know how a new development or construction project would impact an area, they would have the data to know what other businesses are in its vicinity.

**What's in it for your agency?**

- If you participate in our CRM system, you will never have to receive a PDF application from a small business attached to an email. More importantly, you will never have to re-enter the data from this PDF into some other system or form.

- You will be able to see recent interactions between small businesses and your agency.

- You will have data at your fingertips to more easily answer commonly-asked questions from small businesses.

- *<FDS should add one or two talking points that are agency specific. For example, if they are talking to an agency that handles business licenses, they should draft a talking point about how the CRM system could improve business licensing processes.>*