



Tech Executive
Leadership Initiative

POLICY

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City Relationship Manager Portal To Enable COVID-19 Relief

EXECUTIVE SUMMARY

To facilitate the distribution of COVID-19-related economic relief, the City of Foggyton needs a centralized digital directory of small businesses that is internal to city government, accessible to all city agencies, and includes (but is not limited to) basic data such as the business owner's name, address, and type of business. We recommend the evaluation and purchase of an off-the-shelf data management tool that is customized for this task, such as those available from [Salesforce](#), [Emgage](#), or [Accela](#). This City Relationship Manager portal should initially be implemented by Foggyton Digital Services (FDS) within a few key agencies, with budgetary and administrative support provided by the Mayor's Office.

The CRM can support both distribution of COVID-19 relief as well as the collection of standard forms, such as applications for small business grants and permits. A CRM can also be used to set up application forms for loans and any other type of economic relief. The data required can be made accessible through the existing centralized database and requires minimal input from existing small business owners. Moreover, a single access repository can ensure standardization of forms and workflows across all agencies and departments, streamlining operations and permanently changing how small business owners interact with Foggyton's city agencies.

BACKGROUND

The City of Foggyton has diverse agencies that issue permits, award grant funding (typically valued at \$5,000 to \$20,000), and otherwise deliver COVID-19 support to businesses. Currently, each agency requires its own form of small business paperwork and maintains its own database (if it has one at all). For example, if a restaurant wants

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to expand its outdoor dining during COVID-19 by placing tables on the sidewalk, the Department of Public Works is the authority that provides the permit. If a restaurant wants to use the street, the Department of Transportation is the authority. If a restaurant wants to use a parking lane, Parking Enforcement is the authority. In any of these instances, the Fire Department has to be consulted.

Our team's extensive interviews with small business owners about their efforts to obtain COVID-19 grant funding confirmed that the myriad processes are a significant barrier that dissuades businesses from applying for these grants. Moreover, the City currently has more than 200 websites servicing various needs of the city. These websites do not interface with one other, meaning that small businesses must engage separately with each agency separately. Additionally, there is no common data format used by city agencies to enable information sharing regarding businesses.

Prior to COVID-19, FDS was in the process of setting up a unified system for building permits; that effort was derailed by the pandemic, which forced the City to quickly set up forms for grants and loans for small businesses. Because the underlying data was neither co-located nor structured, the forms were difficult to create and therefore cumbersome to use.

ADVANTAGES OF A CENTRALIZED SYSTEM

A City Relationship Manager is a technology platform that could help manage the City of Foggyton's interactions with small businesses and community-based organizations. This system is based on customer relationship manager (CRM) platforms that are widely used in the private sector, which typically capture key information about individual customers of a company, including names, addresses, and other critical information. A CRM system could also capture critical information about individual businesses, including tax identification numbers, addresses, names of owners, number of employees, relevant permits, relevant licenses, and more. The CRM also could have dedicated tabs for each city agency or other functional areas of interest.

For small businesses, this platform would be accessible through a single webpage, where they could maintain critical information. As small businesses fill out forms created by any city agency within the plat-

form, all entries would be automatically captured in the central database. For city agencies, pre-built web interfaces would be available for tasks such as data collection via forms, data aggregation, and process automation. This would also ensure uniformity of forms and workflows, as well as language accessibility, which are major barriers for small business owners applying for relief.

Similar CRM tools are already available from Salesforce, Emgage, and Accela, and they have built-in scaling abilities. The benefits of a centralized, uniform system will continue after the pandemic ends, as small business owners will benefit from reduced paperwork and greater ease of use in accessing city services. With sound data management, this system would also provide greater privacy by improving consistency and controls among city agencies, and ensuring that confidential data is stored securely.

IMPLEMENTING THE CRM SYSTEM

Our Roadmap and Implementation Plan provides a detailed guide to how FDS can implement a CRM system. Our [Roadmap and Implementation Plan](#) details three key phases:

- ▶ During the *Foundation Phase (Phase 1)*, FDS gains an understanding of current processes and manual processes that can be automated using the new CRM system. This phase would include vendor selection, development of a high-level architecture, and identification of staffing and resources needed to implement such a system.
- ▶ In the *Transition Phase (Phase 2)*, FDS creates a “minimum viable product” (MVP) version of the CRM that can be used for initial testing and gathering feedback.¹
- ▶ In the *Migration Phase (Phase 3)*, FDS creates a basic on-boarding process for every city agency to transition to the CRM system. This on-boarding process can be tailored to individual city agencies.

CHALLENGES IN IMPLEMENTING THE CRM SYSTEM

There may be challenges in coordinating this effort among city agen-

¹ In software engineering, a minimum viable product is an early version of a product that has just enough features for users to provide feedback.



Tech Executive Leadership Initiative

cies, as each agency's staff and processes rely upon existing, self-contained databases. City staff may be reluctant to learn a new system. FDS will need to generate trust in the CRM tool by ensuring a positive user experience for city staff and small businesses. To provide an incentive for adoption, city leaders might consider funding a competition, whereby the first agency to fully integrate the CRM receives a reimbursement for any costs incurred during the integration.

Continuous funding is likely necessary to extend the CRM to a greater number of city agencies. The platform will likely require 1-3 years to be fully implemented. However, city agencies will see a reduction in costs and increased efficiency in their business applications.

The CRM will bring many advantages in the future, and in the near term, it will help small businesses access COVID-19 relief funding. Since FDS has already built COVID-19 grant applications from scratch, the department could quickly build new ones in a CRM. Once one application is built in the CRM system, it will be easier to build more. This will enable FDS to build additional grant applications easily and reuse the data collected in future applications.

CONCLUSION

A centralized repository of data and a unified, purpose-built City Relationship Management system will dramatically improve the efficiency of services such as COVID-19 relief applications. Foggyton Digital Services should build this platform, onboard a few key agencies as early adopters, and eventually provide a single common platform to manage applications for all small businesses across the city.

ABOUT TELI

This project was completed as part of the Tech Executive Leadership Initiative (TELI), a 10-week skills-building initiative that prepares experienced technology leaders to engage effectively with public sector challenges. Learn more at aspentechpolicyhub.com/teli



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