

City Relationship Manager Portal to Enable COVID-19 Relief

ROADMAP AND IMPLEMENTATION PLAN

EXECUTIVE SUMMARY

The city of Foggyton has a variety of relief resources available to alleviate the impact of COVID-19 on small businesses. Yet to obtain this relief funding, small business owners must navigate cumbersome processes and multiple online portals. We recommend that the City implement a unified City Relationship Manager (CRM)—a centralized digital directory and data management tool—to alleviate these issues and provide an efficient and effective experience for small business owners. The purpose of this document is to provide a roadmap for the creation and implementation of this CRM tool.

TARGET AUDIENCE

The target audience for this document includes:

1. Key technology and business leaders from Foggyton's Digital Services team (FDS) who are responsible for the creation and management of online portals for relief efforts;
2. Key agency technology and business leaders from agencies that collaborate on relief efforts;
3. Key stakeholders in the decision-making process for technology vendor selection, budget, and operational planning;
4. Technology personnel who would be involved in the planning, design, and implementation of the recommended CRM system; and
5. Other internal and external parties, such as technology vendors who may be involved in the implementation and operation of the CRM system.

BUILDING AND INTEGRATING THE CRM SYSTEM

We recommend a structured, yet agile approach toward implementing the CRM. Figure 1 provides an overview of a recommended approach.

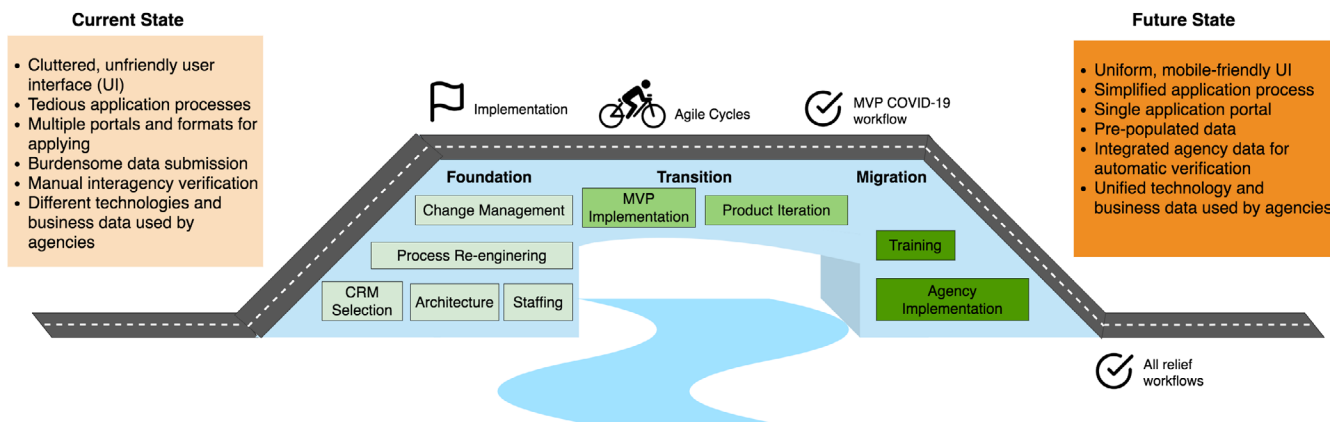


Figure 1: This diagram presents an overview of the multi-phase process of building and integrating the City Relationship Manager system

PHASE 1: FOUNDATION

During Phase 1, FDS should identify manual processes that can be automated using the new CRM. Other action items that should occur during this stage include:

- ▶ Fixing key process issues;
- ▶ Better organizing information on existing portals;
- ▶ Selecting technology vendors for the CRM system;
- ▶ Creating a high-level architecture for the CRM system;
- ▶ Developing a change management plan for implementing the CRM system; and
- ▶ Assessing staffing needs to build and implement the system.

PHASE 2: TRANSITION

In Phase 2, the FDS team should focus on developing a minimum viable product that validates the high-level architecture drafted in Phase 1.¹ This MVP should be used to gather feedback from small business owners and agency staff on how to improve future iterations of the system.

PHASE 3: MIGRATION

In Phase 3, FDS should prioritize supporting city agencies in adopting the CRM platform, based on their needs and technology maturity. This includes migrating each agency's existing data and technology processes into the CRM system.

FDS should also define a baseline onboarding process that can be used to train staff members from any city agency. The process should include gathering feedback to help improve onboarding, and should be flexible to adjust for each agency's unique circumstances.

IMPLEMENTING THE CRM SYSTEM

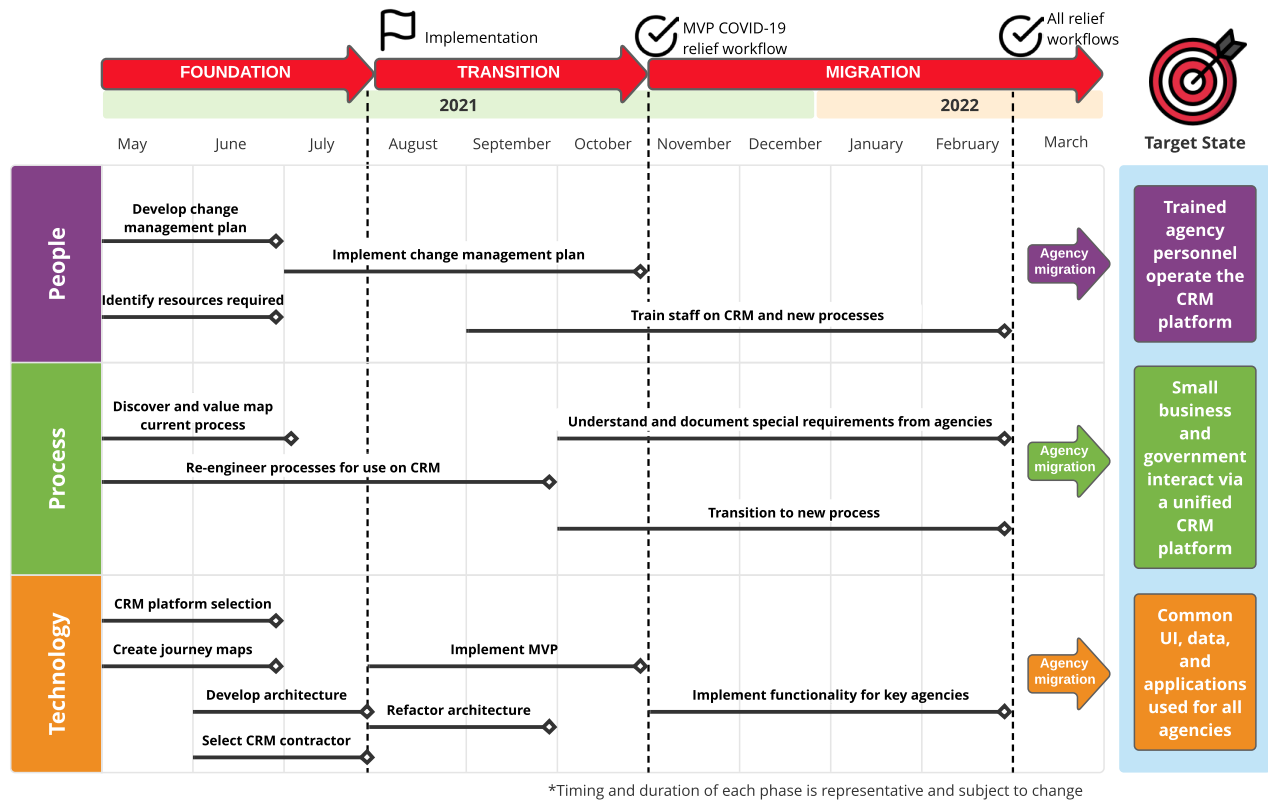


Figure 2: A sample timeline that illustrates the steps needed to enable the CRM

The different implementation phases can be further divided into People, Process, and Technology steps, which can be undertaken in parallel and may lead to the development of new products or features.

TIMELINES

Phase 1, the Foundation phase, should take roughly 2–3 months. The actual length will depend on factors such as the availability of information about current processes and how soon vendors can be identified.

Phase 2, the Transition phase, is estimated to take 3–6 months. The length will depend on which func-

functionalities are implemented and on the complexity of back-end integration.

Phase 3, the Migration phase, is estimated to take 2 or more months. The timing of this phase depends on the complexity of migrating the data and agencies onto the new CRM system.

TASKS

PEOPLE

It is critical to understand the staffing required for planning and implementing the CRM, along with the training required for staff members to adopt the new CRM system. Factors such as complexity, technical skills required to use the system, and the availability and cost of resources to maintain the system should be key factors in selecting a vendor. Feedback gathered through the MVP implementation will also be critical to understanding the staffing capacities required.

PROCESS

Process tasks involve understanding and documenting current processes. A value-stream mapping exercise is very helpful for identifying process inefficiencies.² Value-stream mapping allows teams to re-engineer current process steps or eliminate redundant ones.

The re-engineering process should go hand-in-hand with the CRM functionality implementation, so that feedback from the re-engineering process informs the implementation, and vice-versa. The transition to the new process should be managed with minimal disruption to existing operations.

TECHNOLOGY

This step involves selecting the CRM tool and developing a high-level architecture for use in the MVP form. It will also be important to select the right CRM contractors and consultants.

For building the actual CRM tool, we recommend using a commercial-off-the-shelf (COTS) CRM tool rather than building one internally. Using a COTS tool will save time and effort.

During the MVP implementation phase, users should give feedback on the tool's design, architecture, and ease of use. FDS should use this feedback and iterate to improve the system.

During the migration phase, there should be few (if any) technical changes made to the CRM system. FDS may need to develop custom onboarding processes for city agencies.

POST-DEPLOYMENT TASKS

It is important to understand how the system will be maintained after deployment. The CRM system should be easy and cheap to maintain in the long run. The system design should also be able to handle external and internal changes.

FUNCTIONALITY

Onboarding new agencies may require custom functionality. Feedback from city staff and business users needs to be incorporated into the existing system. These changes are best implemented using [Continuous Integration and Continuous Deployment \(CI/CD\)](#) principles.

DATA

Since the CRM system requires core data about businesses, an adequate process to maintain Business [Master Data](#) should be put in place. Any risks to normal operations due to data quality and availability issues should be accounted for, and procedures of recovery should be developed. Sensitive business data should also be managed via sound data governance and data privacy policies.

CRM APPLICATION

New versions of vendor software may require changes to the CRM system. FDS should ensure that the vendor contract provides the City with access to new versions of the CRM software and access to critical updates, such as security patches. This will help alleviate potential risks associated with incompatibility and security.



Endnotes

- 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.
- 2 In value-stream mapping, managers use flowcharts to illustrate and analyze processes used to deliver a product or service in order to identify improvements.