



2015-2016

Madera County Grand Jury

Final Report

1516-05 MADERA COUNTY 311/CRM SYSTEM

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Introduction:

The Madera County Board of Supervisors implemented a county-wide system that allows better access and availability to county government services. This system is known as 311/CRM (Customer Relations Management). 311/CRM is a 2-part blended system. The 311 portion allows county constituents access to their government processes either through a 'live operator', or through the county's website. The CRM portion allows the public to track the results of their contact with county government. The Grand Jury elected to investigate the operation of this relatively new system.

Facts:

1. 311 is the county answering and information service. 311 operators are trained to answer basic questions concerning county services, initiate service requests, and direct calls to the appropriate county department.
2. CRM is a highly capable database that can be used as an automated service reporting and tracking system and can be modified to process a multitude of service functions for the county, for both in-house and public access.
3. Madera County activated the 311/CRM system in August 2012.
4. The 311/CRM system was originally funded by using developers' impact fees.
5. The 311/CRM system was necessitated by downsizing and furloughs in the county due to the economic downturn.
6. The 311 Customer Service Center operating budget for fiscal year 2015-2016 is \$166,247.
7. Not all county departments use CRM for tracking constituents' requests.
8. The 311 system allows constituents to reach any county department via a non-toll telephone call answered by a live operator during regular business hours. The system can be accessed online 24/7.
9. Currently there are three 311 operators. Four employees in the County Administration Office are qualified to fill in as backups to the primary operators.

10. Ticket/case numbers are automatically assigned when the item is submitted by either the operator or on-line by the constituent. These numbers can be used to track progress of the request by entering it on the 311 website (www.madco311.com).

11. Departments using CRM must have employees who are trained for CRM operation.

Findings:

1. The appreciation of constituents being able to converse with a live operator is difficult to measure, but is highly valued.

2. The Board of Supervisors did not mandate the use of CRM for public interface to all departments.

3. CRM is a robust database application capable of many processes. To utilize CRM a department needs to dedicate the time and effort to work with the Information Technology CRM database manager to develop specific applications for its use.

4. Use of the CRM system is lower than it could be because departments were allowed to opt out at the onset. For example the Road Department transfers CRM service requests to the department's own "GoRequest" system for processing.

5. The Road Department started using the GoRequest system prior to the inception of 311/CRM. GoRequest serves the Road Department and its constituents well. This system is used in many state jurisdictions sending on-line reports of hazardous road conditions to the correct responding agency.

6. Interdepartmental requests for building maintenance, supplies, and job openings are processed through CRM.

7. Requests are delivered to electronic in-boxes of the various departments, addressed by the selection of department at the time of the original report.

8. Department staff training was provided at the onset of 311/CRM, but confusion as to its use and capabilities remain.

9. Some departments that use their own tracking/ticketing systems immediately close the CRM ticket. Others do not use the ticket numbers until after an investigation verifies the validity of the issue.

10. The 311 portion that connects the CRM system to the website, must be updated (replaced) to a version that allows continued operation and patching of the software code. This upgrade, to the 2016 version, has already been approved.

11. The biggest departmental user of 311/CRM is the Madera County Animal Shelter, receiving 35% of 311 calls.

12. Calls into 311 are recorded for information and training purposes. The recording stops if the call is transferred.

Recommendations:

The Grand Jury recommends that:

1. The Board of Supervisors requires the various county departments to work with the Information Technology Department to develop CRM applications that would replace duplicate or redundant systems. This could save the expense of upgrades and maintenance contracts for these other systems.
2. More training is conducted throughout county departments now that the system has been implemented and employees have been exposed to its capability and performance.

Respondents:

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