311 Call Center Boosts Operational Efficiency, Avoids Higher Costs with CRM

Overview

Country or Region: United States
Industry: Local government agencies

Customer Profile
The City of Birmingham, Alabama, launched its 311 call center in 2005 to act as a liaison between citizens and city departments. The 311 call center tracks cases and works with departments to improve service.

Business Situation
The city needed to find a more flexible and cost-effective 311 solution that employees would want to use.

Solution
Working with Microsoft Gold Certified Partner 2B Solutions, the City of Birmingham implemented Microsoft Dynamics CRM and built workflows to support the unique needs of more than 20 departments.
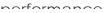
Benefits
- Improved citizen service
- Empowered employees
- Cost-effective, solid technology

"We chose Microsoft Dynamics CRM because the technology is proven and will continue to steadily improve in the future."

Brian Malone, 311 Call Center Director, City of Birmingham

The City of Birmingham, Alabama, needed a new 311 call center solution to help route and track service requests from citizens. The call center's previous system was expensive to maintain, difficult to use, and did not support how city departments worked. The city examined several solutions and selected Microsoft Dynamics CRM because of its technical flexibility, cost-effectiveness, and ease of use. In addition, licensing costs for the solution were just one-fourth of what established 311 software vendors demanded. With help from Microsoft Gold Certified Partner 2B Solutions, the City of Birmingham implemented the solution with custom workflows that supported processes at more than 20 different divisions. Just several months later, the 311 call center has improved service levels and dramatically increased employee adoption of the system, enabling managers to better track performance.

Situation

To better serve its roughly 230,000 residents, the City of Birmingham, Alabama, set up a 311 nonemergency call center in 2005. The 311 call center routes service requests to more than 20 different city divisions that take care of everything from trash removal and street repair to nonemergency police calls and environmental code inspections.

In peak months, the center handles approximately 300 to 400 calls daily. The call center staffs representatives who answer phones and route requests, a manager, and a director who works with other departmental heads to track issues and improve overall service for citizens. The director of the call center reports to the City of Birmingham's Chief of Operations, Jarvis Patton.

In 2008, the City of Birmingham brought in Brian Malone as the new 311 Call Center Director only a month after decommissioning its Motorola CSR system due to financial concerns. "The previous system was technologically sound, but it was not implemented in a way that supported the way our city departments worked," says Malone. "The people who fulfill service requests saw the system as a burden that only made their jobs more difficult. So, when I arrived, not only did we have no system in place, but there was significant resistance to installing a new system because people saw it as a drag on productivity."

Malone understood the need for a formal system to track issues and improve service levels but wanted to be sensitive to the needs of employees in city departments that had to use the system to fulfill requests. "As I researched different call center software packages, I was specifically looking for something that would be easy to configure and customize to meet the unique needs of approximately 20 divisions," says Malone. "I wanted to give people a solution that would help and not hinder, and flexibility was key to making that happen."

Solution

Searching for the right 311 call center solution for the City of Birmingham, Malone compared software packages from various vendors, including Lagan 311, QScend QAlert, and Microsoft Dynamics CRM. Eventually, Malone settled on Microsoft Dynamics CRM based on the solution's superior technical flexibility and cost-effectiveness.

"With roughly 120 users, a solution from one of the established 311 vendors

The City of Birmingham, Alabama, has approximately 230,000 residents.

would have cost us upwards of $200,000 in licensing each year, not including the consulting requirements," says Malone. "Microsoft Dynamics CRM is much more affordable and costs us approximately $50,000 in licensing each year. In addition, it is designed in such a way that business users like me can customize the solution without having to hire outside programmers."

Designing the System

For help implementing the solution, Malone worked with Microsoft Gold Certified Partner 2B Solutions. Installation and deployment of Microsoft Dynamics CRM took about 30 hours, which included tasks such as importing historical data and connecting the system to the city's Microsoft Exchange Server e-mail infrastructure. 2B Solutions also helped set up representatives' screens so that they could quickly address common service requests. However, the bulk of the implementation work involved meetings with more than 20 divisions to discuss the business requirements for each of their groups.

"In one-on-one meetings with the managers and supervisors in each division, we talked about what they needed the system to do and then I implemented it by using the workflow tools provided in Microsoft Dynamics CRM," says Malone. "This consultative approach took some time, but it resulted in a system that people actually want to use because it makes their jobs easier."

Malone and each division worked together to configure the system so that 311 representatives can route service requests to the appropriate people by simply selecting from a series of drop-down menus, as shown in Figure 1. For example, a request to remove a downed tree limb or fix a pothole in a specific neighborhood will go to the right manager in charge of the area of the city. By following the scripted questions, representatives ensure they collect all the information needed to help employees address the issue as quickly and efficiently as possible. This automation saves representatives the time of having to look up who is responsible for a particular service in a certain geographic area of the city.

Reporting and Performance Tracking

Departmental heads at the City of Birmingham use role-based dashboards to track the number of service requests that are open or closed at any given moment and to view the requests assigned to any particular employee or team. In all, Malone set up 19 dashboards for managers whom he works with at the city.

Malone uses the reporting functions in Microsoft Dynamics CRM to report service performance to city resident–elected representatives, including daily caseload and how many issues are open and closed in specific periods. Service tracking is made possible in the solution because data is stored hierarchically. This means separate interactions with citizens can be associated across the time or type of the request, for example. Malone is also working with department managers to create key performance metrics to ensure that the city is improving service to citizens and complying with state regulations, such as the requirement that the city answers pothole requests within a certain time frame.

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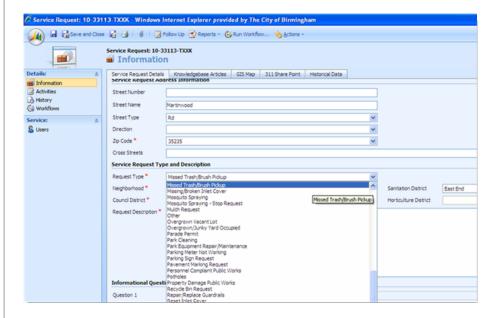Brian Malone, 311 Call Center Director, City of Birmingham

Future Developments

Looking ahead, Malone sees Microsoft Dynamics CRM as a potential platform that could enable the entire City of Birmingham to get a comprehensive view of citizen interactions. For now, however, the divisions that work with the 311 system continue to find ways of deriving greater value from it. "People in the zoning department saw that they could use the system to schedule and

service platform that can potentially provide us with a 360-degree view of citizen interactions," says Malone. "The technology is flexible, cost-effective, and well-suited for citizen service applications."

Improved Citizen Service

The new 311 solution based on Microsoft Dynamics CRM helps the City of Birmingham respond to citizen

track their cases," says Malone. In the call center, Malone plans to integrate the 311 solution with the city's existing geographic information system to help employees more efficiently plan their daily itinerary and speed call-handling times.

Benefits

The City of Birmingham now has a 311 call center solution that flexibly supports the unique needs of more than 20 different city divisions while also helping to improve citizen service. "Microsoft Dynamics CRM works as a citizen

requests more effectively. Because data in the system is stored hierarchically, call center representatives can view related issues when fielding new requests. This contextual information helps representatives interact with citizens in a more informed manner.

In the same way, Malone and other users can investigate and troubleshoot problems in delivering service to citizens. "In meetings with division supervisors, I frequently use data from Microsoft Dynamics CRM to identify

trends or pinpoint areas where we can improve service," says Malone. "With the Advanced Find capability in Microsoft Dynamics CRM coupled with PivotTables in Microsoft Office Excel, I can quickly pull together the information I need for these meetings."

To date, the 311 call center has been able to significantly improve case tracking and resolution. "With Microsoft Dynamics CRM, we're able to resolve issues much faster," says Malone. "The best part is we know the work is being done. We began a follow-up call campaign in February 2010 and made contact with 694 citizens. Ninety-two percent of them said the work they requested had been completed. Obviously, we aren't satisfied with anything less than 100 percent, but we know the system is working and have the processes in place to identify problem areas so that they can be corrected. "

Empowered Employees
The City of Birmingham took advantage of the technical flexibility in Microsoft Dynamics CRM to create a 311 solution that works the way departments work and the way that people expect it to. In contrast to the previous system, employees find Microsoft Dynamics CRM helps them in their everyday work activities.

"People are finding ways to use the solution to help them get their jobs done more efficiently," says Malone. "For example, our trash removal crews now print out the 311 requests located along their routes before they head out each morning. We know this system works because cases get closed daily instead of all at once on a Friday afternoon, which was the case with the

previous system—people were ignoring issues because the system was too troublesome."

On their own initiative, many employees have begun using Microsoft Dynamics CRM as a case management system. For instance, Dexter Young, Zoning Code Inspector for the City of Birmingham, uses Microsoft Dynamics CRM to track up to 15 cases he has open at any one time. "Now, I use Microsoft Dynamics CRM to track all my work, even if it doesn't come directly through the 311 call center," he says. "This way, I can easily see what cases I have open or I can answer questions about cases that I worked on earlier. For example, a city council member may call to ask about a certain zoning case; with the solution, I can find the answer to his or her questions at that moment while on the phone."

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For more information about the City of Birmingham services, call (205) 254-6314 or visit the Web site at:
www.informationbirmingham.com

For more information about 2B Solutions products and services, call (205) 408-9991 or visit the Web site at:
www.2bsolutions.net

Cost-Effective, Solid Technology

The new 311 call center solution built on Microsoft Dynamics CRM is significantly less expensive than alternatives—just the licensing alone saved the City of Birmingham more than U.S.$150,000 compared with established industry solutions. "Cost was not the most important issue that drove us to select Microsoft Dynamics CRM, and there were some less expensive offerings from niche vendors that we considered," says Malone. "We chose Microsoft Dynamics CRM because the technology is proven and will continue to steadily improve in the future."

Moreover, business users with the inclination to do so—like Malone, the call center director—can learn how to customize screens and workflows themselves without having to rely on outside programmers. "Any time you bring in consultants, you run the risk of dealing with cost overruns," says Malone. "Microsoft Dynamics CRM is very approachable technology, so people without deep technical expertise can still work with it effectively. And, if we do need help, we have a great local partner to work with."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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