Virginia Information Technologies Agency

VITA

NASCIO
Representing Chief Information
Officers of the States

Customer Relationship Management (CRM)
Category: Cross-Boundary Collaboration and Partnerships

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Executive Summary

Providing cutting-edge technology despite fiscal constraints is a challenge. Virginia Information Technologies Agency (VITA) launched the customer relationship management (CRM) system, an enterprise-wide strategic effort.

Beginning in 2010, VITA coordinated implementation of a shared-services model at a dozen agencies. Outdated systems and manual processes prevented the commonwealth from providing high-quality, contemporary services. Silo-based and unsupported systems precluded viable interagency collaboration.

Launching the CRM initiative resulted in several benefits: support for the governor's priorities to leverage technology through automated business processes, productivity through technology, expanded back-office platforms and improved information sharing to optimize business functions.

The modernization eliminated customized agency solutions, infrastructure expenses and legacy systems. Manual processes were streamlined and resulted in better customer service. The initiative promoted inter-agency collaboration and allowed staff to focus on other assignments. The endeavor expanded 24x7x365 Web access, reduced constituent and vendor response time and brought innovation that translated into taxpayer savings.

According to Virginia Chief Information Officer Sam A. Nixon, deployment of the CRM initiative replaced legacy systems and "provided a considerably enhanced user experience and workflow process in the back office that previously did not exist at all."

A broad consortium of agencies led by the Governor and his Cabinet partnered to implement the CRM tool to meet a variety of business needs, including:

- Office of the Governor
- Secretary of the Commonwealth
- Secretary of Commerce and Trade
- Secretary of Technology
- State Board of Elections (SBE)
- Department of Behavioral Health and Developmental Services (DBHDS)
- Department of Historic Resources (DHR)
- Virginia Information Technologies Agency (VITA)
- Department of Corrections (DOC)
- Department of Juvenile Justice (DJJ)
- Workforce One Stop Career Centers
- Department of Social Services (DSS)
- Department of Education (VDOE)

Description of the business problem

Legacy systems and manual processes prevented the commonwealth from providing high-quality, contemporary technology services. Agencies shared a need to provide effective customer management but used different platforms that impaired effective inter-agency collaboration. Traditional paper processing inhibited adequate customer service. Unsupported software and hardware systems precluded viable inter-agency correspondence. Customer and constituent correspondence lacked coordination and created redundancies and inefficiencies.

Solution

CRM was implemented through a shared-services model and launched unprecedented enhancements beginning in 2010 led by the Governor's office and joined by several agencies throughout the commonwealth. To provide an agency-appropriate solution, either the off-the-shelf product was configured in-house at an agency or it was customized with VITA technical team assistance. Through the CRM integration, all agency solutions simplified the user experience and improved back office workflow. The comprehensive technology resource centralized management for contact, cases, activities, scheduling, services, communications and reporting.

To maximize shared services across agencies through the commonwealth's private cloud, manual processes, databases and rosters were streamlined into a single hub. Legacy systems and paper-based processes were revamped. Contact management systems were enhanced with tracking capabilities. In other words, account history, case management, and customer support is managed in a central location.

Agencies with existing CRM platforms plan to expand service offerings to leverage internet-facing deployments, integration with SharePoint and other software applications. For instance, the VITA Customer Account Service Tool (VCAST) might integrate future marketing and workflow technology programs for customer segmentation and automation approval processes. Likewise, DBHDS is developing a case management infrastructure for 2014. Transition of the CRM initiative to other agencies has already begun.

Project definition and scope

Agencies provided oversight and project management for implementation of the CRM initiative. Some agencies contracted for support services through the VITA CRM development team. Others compiled an internal team and leveraged consultants to manage architecture, data migration, case management development, help desk support, training and launch within the commonwealth cloud environment. Customization provided a case-by-case basis for dashboard, heat map and other setup configurations, as needed.

VITA's implementation of the CRM tool is part of a broader CRM strategic plan. VITA navigated its installation using a keen project management focus and Gartner's eight building blocks of customer relationship management.

CRM is a collection of technology resources available out-of-the-box. Virginia's solution leveraged the existing Microsoft Office platform. Electronic mail was in place with Outlook and Exchange; security enhancements utilized Microsoft Active Directory. The CRM project integrates with other commonwealth Microsoft products including SQL Server, Visual Studio, .NET, SharePoint, and Scribe for data migration.

With the implementation of the CRM initiative, agencies have greater access to services and flexibility with program oversight. This provides choices including cloud-based, on-site or CRM-based platforms. The flexibility of the CRM platform allows for greater creativity. The CRM leverages existing Microsoft platforms; Microsoft Active Directory is used as part of the commonwealth's information security suite. The tool also is compliant with federal and state accessibility statutes.

Communicating implementation of the CRM project was accomplished keeping in mind business use. Some agencies launched a formal rollout and program launch. Most developed a training curriculum for internal users. Others developed video tutorials, self-paced guides and online resources. The DHR office of compliance and review created a website resource to communicate program objectives.

Significance of the project

Throughout the commonwealth, the CRM project resulted in significantly enhanced state operations. This progress improved customer service, streamlined data management and maximized technology platforms. Beneficiaries for the project include citizens, agencies and localities, vendors, businesses and non-profit organizations.

The coordination of efforts from one platform merged various user experiences – video, audio, and virtual – to facilitate customer outcome. The project improved relationships and interaction, reinforced collaboration and streamlined business processes.

NASCIO state CIO technology priorities and enterprise strategies for the commonwealth of Virginia are embedded within the CRM project. The initiative demonstrates aligns with NASCIO's 2012 State CIO priorities including consolidation and optimization, cloud services, budget and cost control, shared services and legacy modernization. Agencies operate within a single platform on the commonwealth's private cloud. Also, there is the clear underlying support for innovative technology.

The CRM project reinforces Governor Bob McDonnell's priorities outlined in his Commission on Government Reform and Restructuring including automated business processes, improved productivity through technology, expanded back-office platforms and enhanced information sharing to optimize business functions and supporting systems. The data exchange objective accomplished cross-agency collaboration and accountability. This resulted in better customer service, use of shared services and a

long-term investment in customer-centric business processes. Furthermore, the CRM project aligns with executive priorities as evidenced in a governor's press release.

In March 2013, Virginia received the Microsoft Dynamics Customer Excellence Award for the public sector from more than 1,000 public sector submissions based upon its measurable success improving citizen services using the unique CRM software. A video on the Governor's YouTube channel further depicts the commonwealth's efforts.

Benefit of the project

Significant improvements resulted for stakeholders and demonstrated quantitative and qualitative benefits, policy and procedural benefits and efficiencies. There are several benefits for multiple stakeholders including qualitative and quantitative benefits. Through leveraging the shared information technology platform, citizens, agencies, partners and localities have profited from modernized systems.

Project impact

Stakeholders affected in different ways by CRM include citizens, agencies and localities, policymakers and partners – vendors, businesses, and non-profit organizations. Here is a sample of improvements within various agencies.

Agency	Usages Improved
Office of the Governor	- Community relations and communications - Legislative tracking
Secretary of the Commonwealth	- Board and commission applications and appointments - Restoration of rights - Notary, authentications and eNotary - Statement of economic interest - Lobbyist registrations - Service of process
Secretary of Commerce and Trade	- Business One-Stop website - Contact management
State Board of Elections (SBE)	- Campaign finance filing process - Vendor management
Department of Historic Resources (DHR)	Electronic Project Information Exchange (ePIX)

Department of Behavioral Health and Development Services (DBHDS)	• Federal and state reporting requirements • Medicaid waiver pre-authorization submission and tracking • Case management
Secretary of Technology	• Contact management • iPhone operation system enablement • SharePoint pilot
Virginia Information Technologies Agency (VITA)	• VITA Customer Account Service Tool (VCAST)

Project outcomes

With implementation of the CRM project, various outcomes have resulted. Stovepipe and silo-based systems inhibited inter- and intra-agency communications. Legacy systems did not leverage shared services. Through the CRM endeavor, efficiency of state government operations and accountability has been enhanced. VCAST, contact management within the Secretary of Technology's Office and the Business One Stop website initiative exemplify cross-agency collaboration resulting in better data management and delivery of services for citizens and partners.

Quantitative Benefit

CRM produces quantitative benefits:

- automated more than 40 citizen-facing business processes and services
- digitized and reduced application processing time from 30 days to 7 days
- eliminated $150,000 in annual expenses for infrastructure support and shared expenses for servers and storage at the Secretary of the Commonwealth
- improved operational efficiencies for more than 200 CRM users in the governor's office, secretariats and legislative operations
- automated the notary commission process to an online recertification and payment process; reduced certification time from 30 days to 7 days; producing a savings of 828,000 work days redirected for other assignments
- cut community relations processing time by 45 percent for 46,000 requests per year; reduced community relations staff by 50 percent
- coordinated vendor management for 25 different Virginia-based voting devices
- processed campaign finance filing for more than 1,400 campaigns and political committees in 134 localities through the locality management system
- reduced staff tracking and reporting time at DBHDS by more than 50 percent
- revamped paper-based application processes to an online platform thereby reducing shipping, postage, paper supply and associated duplication expenses
- streamlined board and commission appointment processes cutting the approval process time from 30 days to less than 7 days

Qualitative benefit

The enterprise-wide implementation of CRM has demonstrated significant operational benefits. These include actual versus anticipated benefits. The CRM project also produced qualitative benefits where implementation:

- launched a central repository within the private cloud platform
- created easier SBE Web portal access for citizens and others
- improved VITA agency correspondence through VCAST implementation
- streamlined DHR submissions of large hard copy files for roadways and reports
- facilitated better client monitoring of DHR submissions through the ePIX
- reinforced a common user experience with services and support
- reduced the need for contract services and achieved cost savings
- automated case management systems allowing for customized reporting
- streamlined restoration of rights data for convicted felons
- supported legacy data conversions with the existing MS Office Suite

Fiscal outcomes

Implementing an off-the-shelf product with minimal enhancements resulted in favorable savings. Upfront costs normally associated with system upgrades were mitigated because of the existing Microsoft Office platform. Unrealized expenses for programmer application development were cost savings achieved through the CRM initiative. Traditional expenses otherwise incurred translated into a meaningful return on investment for the commonwealth.

Short-term returns for the CRM project through staff resource allocation, training and data mining yielded actual benefits. The immediate gain resulted in central repositories, a Web-based portal, enhanced data exchange and greater inter-agency efficiencies. Long-term benefits – given the rolling implementation phases – are significant taxpayer savings yet to be realized.