



**Constituent Relationship Management
Modernization for the Governor's Office and
Lieutenant Governor's Office**

State CIO Office Special Recognition

State: Pennsylvania
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Project Initiation: 02/07/2019
Project End Date: 12/06/2019:

Executive Summary

Every year, Pennsylvania's Office of the Governor and Lieutenant Governor's Office are contacted hundreds of thousands of times by constituents wishing to ask questions, request information, or voice their opinions on a myriad of topics. Every one of these interactions requires a consistent, timely, and accurate response, either from the office that was contacted or by referral to another state agency. Despite the high-volume and criticality of these interactions between state government and the people it serves, Pennsylvania was burdened by systems and processes that relied on paper-based tracking forms, local spreadsheets, two homegrown databases, and one commercial-off-the-shelf (COTS) product. Communication and tracking of activities between teams within the Governor's Office and Lieutenant Governor's Office were complicated and had to be done by hand. Moreover, the existing constituent relationship management (CRM) system, including a series of manual processes that relied on hard-copy materials, did not conform to the Commonwealth's strategic IT goals. The offices were also unable to derive actionable insights from these interactions.

Upon learning of these challenges, the state CIO's office initiated a modernization initiative to improve the management of constituent interactions and align to the commonwealth's IT strategic goals. The project presented an opportunity for the Governor's Office and Lieutenant Governor's Office to lead by example by demonstrating a commitment to customer service and the Governor's goal for "Government that Works."

Pennsylvania implemented a web-based CRM solution that addressed the existing business needs, met the CIO's strategic goals, and provided greater functionality. The new system allows for automated workflows and links data between teams to provide a holistic view of constituent contacts. The solution also includes message management, call center logs, issue tracking, extensive contact records, outreach processes, and a module to manage the selection, appointment and, if necessary, confirmation, of individuals appointed by the Governor to various boards and commissions.

The solution was implemented in four phases to allow the project team to improve its approach based on lessons learned from prior phases. The final phase included automating processes for boards and commissions, which had been entirely manual since their inception. These improvements were implemented with zero user concerns, issues, or questions after the initial training.

Pennsylvania agencies, including some that are not under the Governor's jurisdiction, also utilize the solution. This enables records to be assigned to the agency resources best able to respond while still allowing the Governor's and Lieutenant Governor's teams to maintain control and tracking of correspondence and inquiries which were originally sent to them.

The project has transformed how the Office of the Governor and the Lieutenant Governor's Office conduct business. For the first time, the offices can pull reports and data analytics without manually tallying counts from different sources and see at a glance where constituent inquiries are coming from, what issues are important to them, and how many contacts staff can process. In addition, workers can enjoy mobility that was impossible before. Because of the seamless interface between the teams, the offices are now able to offer holistic and consistent information to individual constituents who reach out multiple times. From January 1, 2020 to May 31, 2020, the solution was been used to handle and route over 200,000 individual inquiries and track over 575,000 constituent contacts.

Project Narrative

Concept

Governor Wolf began his administration with three simple goals: Jobs that Pay, Schools that Teach and Government that Works. The State CIO's strategic plan aligns to and supports these priorities through goals to:

- Optimize Services
- Transform Government
- Enable Customer Service Transformation
- Empower a Diverse Workforce
- Foster Collaboration, Communication and Governance

These goals directly tie into constituent-related activities that the Office of the Governor and Lieutenant Governor's Office perform daily. Activities such as citizen correspondences, casework requests, and the Governor's call center, connect the Office of the Governor and state agencies to citizens, constituency groups, associations, local governments, and others to listen, learn, and address matters. The Office of the Governor and the Lieutenant Governor's Office together receive hundreds of thousands of contacts from constituents each year via phone, website inquiries, email, and direct mail.

When Governor Wolf took office, his team inherited a constituent relationship management (CRM) process that did not meet their business needs and failed to take advantage of technological capabilities. The team used a set of disparate tools and manual processes to track constituent contacts. These tools and processes did not link to one another, forcing staff to manually count and combine internal data to answer the most basic questions. Separate teams could not merge data, so constituents who had contacted the Governor's Office multiple times could not be tracked and offered a cohesive, comprehensive response to their questions and comments.

A cohesive CRM was needed to facilitate these job functions and to meet CIO MacMillan's strategic goals. The Office of the Governor worked with CIO MacMillan's team to identify and select Leidos DSI's Intranet Quorum (IQ) software. The solution answered all the issues raised by the current solutions and offers greater functionality and increased efficiencies to the Office of the Governor and the Lieutenant Governor's Office. IQ automates enterprise planning and cross-references information between teams. IQ also allows for automation of processes that were completely manual under the previous solutions. Specifically, it allows the two offices to:

- Organize Mail Inbox (Message Management)
- Optimize Outreach (Outreach)
- Gain Crucial Insights (Reports and Analytics)
- Simplify Service Requests (Citizen Services, Casework, Call Logging)
- Manage Boards and Commissions (IQ Boards)

The project entailed mapping existing business processes, re-engineering processes to take advantage of automation capabilities, configuring the CRM solution, developing customized elements, mapping and migrating data, and providing extensive training on the tool.

Because the project used an iterative approach, the team was able to improve processes and incorporate lessons learned throughout the development and implementation processes. Subsequent

phases were completed faster and with a higher level of end-user satisfaction despite adding time for collaborative testing and enhanced training sessions. These changes led to a final phase being implemented with zero user concerns, issues, or questions after the initial training and go-live date.



- Phase 1: Correspondence, Outreach, and Call Center. Three teams within the Office of the Governor went live with IQ. These teams represented the bulk of the work handled by the Office of the Governor. Correspondence includes mail, web forms, emails, and survey responses. The Outreach team handles newsletters, mailing lists, and other outreach. The Call Center receives all calls to the Office of the Governor.
- Phase 2: Agency Rollout. Many of the correspondence and calls received by the Office of the Governor are best handled by the other government agencies and departments. During phase two, over 40 agencies went live with IQ for items routed to them from the Office of the Governor.
- Phase 3: Lieutenant Governor’s Office. The Lieutenant Governor’s Office went live with capabilities specific to its functions.
- Phase 4: Boards and Commissions. Previously, tracking the appointments and membership of over 500 boards and commissions was a highly manual process. With IQ, tracking of board and commission memberships and appointments is almost completely automated.

Significance

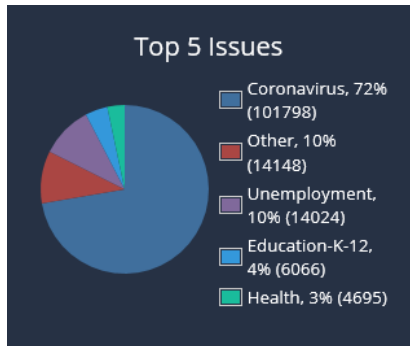
CIO MacMillan has outlined five strategic IT goals for Pennsylvania, and the project touched on each of these while promoting Governor Wolf’s goal of “Government that Works” for Pennsylvania. The strategic goals include:



- **Optimize Services.** IQ has expedited constituent responses and tracking, allowing both the Office of the Governor and the Lieutenant Governor’s Office to respond more quickly to constituent concerns. Also, since several key surveys were tied into IQ, the system has allowed the Governor’s Office to use real-time constituent data to drive decision making on key issues.
- **Transform Government.** The solution has modernized a series of manually based workflows while also bringing modern technology and capabilities to the offices.
- **Enable Customer Service Transformation.** IQ offers teams the ability to update constituent data in real-time and to link to customer satisfaction surveys. This linkage has allowed the Office of the Governor and the Lieutenant Governor’s Office to track and improve constituent satisfaction and to quickly connect citizens with the appropriate state government agencies.
- **Empower a Diverse Workforce.** IQ is a web-based solution, which allows the team to step away from local tracking forms and workflows based on hard copy and manual processes. As a result, the various teams within the two offices can provide cross-team coverage and respond to constituent contacts and inquiries regardless of their physical location.
- **Foster Collaboration, Communication, and Governance.** A significant portion of the project entailed providing access to liaisons within each government agency. These liaisons can access IQ

directly and, through the system, communicate quickly and effectively with the Office of the Governor and the Lieutenant Governor’s Offices.

The initiative impacted all facets of state government, with liaisons and users from over 40 state agencies coming together into a single system. Users include representatives from state-affiliated



agencies which are not under the Governor’s jurisdiction. Cross-agency collaboration in Pennsylvania reflects a new “normal” in business operations, and the IQ project has furthered this collaboration.

With the solution fully implemented, the two offices have streamlined their workflows and begun tracking additional constituent contacts, such as outreach from the Office of the Governor and customer satisfaction survey results. The two offices now have access to real-time data about constituent contacts. They

can track multiple contacts from the same constituent to provide a holistic response to their concerns and issues. For the first time, the Office of the Governor has an automated method of tracking referrals and appointments to the various boards and commissions throughout Pennsylvania.

Impact

Prior to the implementation of IQ, the two offices relied on several disparate systems that did not communicate with one another. Several key processes were completed manually, with virtually no tracking of the work. The implementation achieved several key impacts for the two offices:

- Seamless and Systemic Approach to Constituent Relationships.** By streamlining and consolidating what had been several applications and manual processes into single solution, the Office of the Governor and the Lieutenant Governor’s Office can incorporate a systematic, cross-team approach to constituent relationships. Data between teams can be compared via a seamless interface that links various contact points directly to a single constituent, business, or public group. Because the approach incorporates the same system, cross-team training has been built into existing workflows.
- Automation of Manual Processes.** The teams spend less time on rote tasks. By reducing their reliance on manual processes, the solution has allowed the Office of the Governor and the Lieutenant Governor’s Office to incorporate a more mobile approach without sacrificing the response rate back to constituents. Activities, such as producing archival records, can be done with just a few mouse clicks without the need for staff to collate manual records. In addition, the system incorporates web forms and surveys, increasing the speed at which constituent feedback and concerns reach the Office of the Governor. In 2020, over 90% of correspondence now comes in via web forms that feed directly into the system.
- Data-Driven Decision Making.** The two offices can now pull data in real-time to facilitate decision making. Comparing data between teams can be done seamlessly and allows the Office of the

- 575,955 Constituent Contact Records
- 176,055 Incoming Correspondence
- 159,244 Web Form Contacts
- 19,583 Incoming Calls
- 12,640 Board Member Applications
- 4,330 Casework Contacts
- 532 Comments from Satisfaction Surveys
- 3 Linked Satisfaction Surveys

Governor and the Lieutenant Governor’s Office to quickly identify the issues that impact Pennsylvanians or to see contacts at a county level.

- **Holistic View of Constituent Contacts.** For the first time, the Office of the Governor and Lieutenant Governor’s Office can see at a glance who is calling, where they are calling from, who has reached out multiple times, and what the key issues are. Because the solution tracks contact history, teams can provide details back to constituents and ensure that messages are consistent.

Message Contact Locations
Number of Contacts

