

# A Dynamic Energy

*Enabling Modern Service Delivery*

Category: Data Management, Analytics and Visualization



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## Executive Summary

In 2010, the Oregon Department of Energy (ODOE) identified weaknesses within the current data and business processes of its five divisions, and had difficulty integrating the activities and information gathered by each division. Additionally, ODOE had issues with providing quality data that could be used to drive energy policy decisions. Through a 2013-2015 Oregon Policy Option Package, ODOE hired a consulting firm, Delaris, to review business and technology processes associated with the acquisition, storage, and dissemination of energy related data.

Delaris identified major opportunities for improvement within ODOE business and data practices. First, very little data governance or data management was in place leading to significant data issues within the organization. Second, business processes were siloed to individuals, with very little collaborative business processes existing within the agency. Work processes were very manual and siloed in nature, with minimal transparency both within the agency, and to external customers. One of three suggested actions from the Delaris analysis was the implementation of a customer relationship management (CRM) system. This system would provide improved data quality, documented and consistent business processes, transparency into business efforts, and the ability to collect and review business metrics.

A project team was created with representation from each business unit. A project steering committee was established from executive management, including the human resources director. The project team performed a comprehensive review of all agency business processes, and began mapping prioritized processes that would be addressed as part of the CRM implementation project. An initial set of thirty-nine (39) business processes were evaluated and prioritized, and a final set of five (5) processes were chosen for the initial project plan. The initial stages of the project plan included:

1. Consolidation - cleansing, centralization, and implemented governance of agency customer data
2. Creation - of reporting capabilities to provide insights into service delivery
3. Automation - of existing internal business processes
4. Implementation - of case management for agency requests and projects, providing team-based service delivery
5. Deployment - of a public portal, enabling improved data quality and interactive service delivery.

Communication, training, and adoption activities keyed the implementation of each stage of this project. Phases followed a consistent pattern of communication occurring early and often, with project team members acting as change champions. As a result, data quality significantly improved; agency activities are much more transparent both internally and externally; many business processes were automated and are now consistent; and public facing services are easier to request and more interactive for citizens and businesses. The resulting CRM system provides dynamic energy, enabling modern service delivery at the ODOE, both now and in the future.

## Idea: Project Narrative

Through a 2013-2015 Oregon Policy Option Package, the ODOE (Energy) hired a consulting firm, Delaris, to review the business and technology processes associated with the acquisition, storage, and dissemination of Energy business data. One of the recommended solutions prescribed by the Delaris study included the implementation of a Customer Relationship Management (CRM) solution to help track Energy's interactions with Oregon citizens, Energy stakeholders, and partners.

Previously, no system existed to comprehensively track communication and activities with Energy's customers, stakeholders, and partners. Relationships and activities were tied specifically to individual employees, leaving no way to assist a customer if a specific employee was unavailable. Additionally, Energy staff did not have a holistic view of Agency interactions with customers. Creating a stakeholder activity and service profile was a manual business process, in which extracts were created and compiled from each individual business unit. The end result required a substantial amount of staff time and was unreliable. The lack of a centralized system resulted in inefficient stakeholder interactions, and a significant administrative overhead expenditure of agency resources.

The purpose of this project was to implement a CRM platform that would allow ODOE to do the following:

- Standardize multiple unrelated and unsupported contact lists and systems into a single master contact database; providing increased efficiency, lower data duplication, and greater data accuracy.
- Standardize business processes and workflows into a formal, documented, and resilient system, with consistent delivery and improved succession planning.
- Provide timely and comprehensive views of stakeholder, partner, and citizen interactions using modern reporting tools.
- Provide a team-based collaborative approach to cases and services.
- Provide Oregon citizens, stakeholders, and partners with online insight into the status of ODOE interactions, projects, and applications.
- Allow for the online submission of applications and project requests, improving ODOE and end user efficiency.
- Provide a platform for the enforcement of data rules and data validation.
- Improve the ability of Energy to track and report on customer service and communication performance measures.

These goals, associated with the overall purpose of this project, allow ODOE staff to operate in a more efficient, effective, and timely manner when providing services.

The operational improvements from this project have universal applicability to all government agencies in the following ways:

1. Digital Government – implementation of the public portal has significantly improved Energy’s ability to engage with, and provide services to, Oregon citizens, businesses, and stakeholders.
2. Cost Control – the CRM significantly decreased the amount of time needed to create modern solutions in response to business needs or legislative mandates.
3. Data Management and Analytics – One major component of the project was to standardize the data and data management of agency contacts and activities. Doing so has allowed Energy to use data analytics tools, to provide on the fly analytics of Energy activities and services.
4. Collaboration – the project has eliminated individual work siloes and fostered the ability to provide collaborative services to citizens, businesses, and stakeholders.
5. Constituent Relationship Management – the new platform allows Energy to provide focused services to citizens, businesses, partners, and stakeholders.

The Customer Relationship Management (CRM) system implementation provides a modern platform for collecting and storing Energy’s stakeholder contact and service delivery data. The platform provides a team based collaborative service delivery model improving services to stakeholders, partners, businesses, and citizens. This project has improved data quality, reporting capabilities, business process efficiency, and the customer experience. The CRM system is built on the Dynamics platform, providing continuity and synchronicity with, the strategic direction of the State of Oregon as it moves to the Microsoft 365 platform.

## **Implementation**

This project was initially established by forming internal project teams. The Steering Committee consisted of the executive management team and Energy’s Human Resources director. The CRM Project Team consisted of assigned IT staff and representatives from each functional area, and added subject matter experts as needed. Decisions made by the Steering Committee were assigned to and executed by the Project Team.

As with any major organizational change, change management and user adoption were major responsibilities of the two teams. The Project Team members were specifically charged with being change champions within their business units, and for driving a grass roots bottom up adoption. The Steering Committee members provided agency wide, top down adoption activities. Additionally, a comprehensive communications plan provided marketing and continuous communication about the project to agency members. During meetings, adoption and usage numbers were reviewed.

The Project Team was utilized heavily in the initial stages of the project to lay out the product choice and set task priorities. The initial meetings of the Project Team identified business processes that could be improved based upon the project goals. Additionally, project staff conducted interviews with all staff to review their work, work processes, and identify shadow systems and siloed data repositories. Thirty nine business processes

were identified, analyzed, and prioritized, and a top ten list was created. This listing was then used by the Project Team to make a recommendation to the Steering Team, on the top five processes to address during this project.

The Project Team also performed an analysis and review of options that would assist in the creation of a technical solution for the project. The two main options reviewed were Salesforce and Dynamics 365. Ultimately, the Project Team recommended Dynamics 365 based upon Project Team feedback, the move of the State of Oregon to the Microsoft cloud stack, and the need to limit the number of technologies supported by Energy staff.

CRM project implementation was broken in to five phases, each building upon the last. All phases of this implementation have been completed and are in production.

### Implementation Phases

Phase 1—Base implementation: Configuration of the tool, initial end user training, and basic activity tracking.

Phase 2—Reporting and geocoding of contact records: Allowing reports by geographic, political, or service boundaries.

Phase 3—Basic case management: Automated the Energy Supplier Assessment business process workflow.

Phase 4—Project Service Automation: Established project entity types and began tracking activities by project. Created project templates for project, resource, and time management for future projects.

Phase 5 --External Customer Portal: Allowing direct end user case submission to Energy. Increased the scope of the phase to not only deliver the revised Code Outreach workflow, but to add Solar Rebate Contractor Registration and the Ask ODOE workflow. <https://odoe.powerappsportals.us/>

Energy's CRM system implementation was completed in February 2020. This project included several of the 2021 NASCIO Top Ten Priorities such as: Data Management and Analytics, Consolidation/Optimization, and Customer Relationship Management.

### **Impact: Dynamic Changes**

Implementation of the CRM project has significantly enhanced the ability of the Oregon Department of Energy to provide secure cloud based collaborative services, in a transparent manner to citizens, businesses, partners, and stakeholders. Most aspects of this project to not have before/after metrics for comparison, as the capabilities and improvements provided through this project, simply did not exist prior to the project and solution implementation. The following sections highlight dynamic CRM system impacts.

## **Data Consolidation and Enhancement**

The initial stage of the project involved creating a master record of agency contacts. Prior to this project, contact information was being kept in spreadsheets, contact lists, and other individual documents—the documents were often kept in personal storage, and often in formats that were unusable by any form of automation. The project cataloged all contact lists, merged the data, and cleaned erroneous/duplicative data, and established data ownership and management over the records. Additionally, contact records are automatically geocoded, allowing for additional automation by integrating the contact records with geopolitical and demographic GIS data catalogs. This impact provided ODOE with an increased ability to perform data analysis on agency activities.

## **Business Analysis and Reporting**

The creation of a master data record for contacts and activities now allows for a new level of transparency. Staff members can easily review activities related to an individual or an organization. The geocoding implemented has allowed Energy to tie services to political districts and demographic data, and provide reports on activities to senators, representatives, local governments, utilities, and others on services provided within their areas of responsibility. Energy can now review services related to specific communities, where the possibility previously did not exist.

The implementation of this platform and consolidation of data, has also allowed staff to use data analytics tools, to analyze activities on an ad hoc basis. Energy currently utilizes PowerBI to access data and perform data analytics on activities and usage.

## **Collaborative Business Process Redesign**

Prior to the CRM project, many Energy business processes were managed through individual spreadsheets, personal documents, and/or personal memory. The situation was not conducive to team based services and limited adequate succession planning. The migration of business processes to the modern cloud platform has allowed for two significant business process improvements. First, business processes have been redesigned to be collaborative and transparent, and allow team members to easily support each other, while allowing management to view service status. Second, the design of the process actually documents the process, and allows for consistent service regardless of who is supporting the process.

## **Business and Citizen Service Delivery Improvements**

The ODOE External Portal has revamped how Energy provides services to business and citizens in Oregon. Historically, old business processes were very manual and contained many steps that required duplicate work and significant opportunities for data errors. Requests for assistance or services came in through phone, email, attached word documents, or fax, requiring reentry of information, and a lack of data validation. The status of applications for service requests, were not available for customers.

Implementation of the ODOE External Portal has fundamentally changed the way Energy interacts with businesses and citizens now and in the future. Applications and requests for service are collected via web forms, providing data validation and eliminating duplicate entries, reducing processing time, and dramatically improving data quality. Customers can return and check on the status of requests, and also view interactions and activities associated with requests. The level of transparency significantly improves the customer experience, and reduces the administrative support time required within Energy.

### **Business Metrics Collection**

The implementation of the CRM has allowed Energy to gather, view, and analyze metrics on our interactions with businesses, citizens, partners, and stakeholders. Simple metrics such as mean time to resolution, time between a request and response, or number of cases in a time period, are now easily available. Dashboards using built in tools can be individualized for users based on an individual's role—advanced analytics can be performed using tools such as PowerBI and SQL Server. Additionally, service standards can be set with automation, automatically escalating a request when standards have not been met. Going into the future, Energy has the ability to view and track longitudinal metrics to help the agency analyze ongoing service delivery and identify opportunities for improvement.

### **Business Agility**

A major impact of the CRM platform has been the improved ability of Energy, to respond to stakeholder requests and implement new programs. The CRM platform allows for rapid development of applications, allowing Energy to provide new services and programs to businesses and citizens in an expedited manner. During the project, Energy was able to include the development of a Solar Contractor Registration system due to the foundational capabilities of the Portal, and the ease of low code development provided through the CRM platform.

### **A Note from the Project Sponsor**

The Customer Relationship Management (CRM) system has met and exceeded the goals of Energy, resulting in immediate improvements to data management and analysis, and business processes. Stakeholder, partner, and customer data is now consolidated and is more reliable and trustworthy. Select business processes have been migrated to the CRM platform, and highlight the tool's capabilities. As this CRM adoption continues, service transparency will also advance and yield an even greater value. The dynamic energy of this CRM system enables modern service delivery, provides a foundation for additional operational value, business efficiency, and an improved citizen experience, both now and in the future.