# Requirements Overview

This document defines the functionality needed to successfully implement PhillyRising marketing campaigns for Philly311 CRM solution on Salesforce.

# Workshop Location and Time: 23 January 2015; City Hall Conference Room 153

# Workshop Attendees:

* Kimberly Adams
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# Requirements

During the Pilot phase of the Philadelphia 311 Project, Unisys will implement the scope listed below, for the City's PhillyRising initiative. The estimated Salesforce users for the Pilot include for a maximum of three (3) PhillyRising neighborhoods, fifteen (15) community partners, eight (8) call center agents, three (3) call center supervisors, one (1) 311 managing director , up to three (3) 311 Call Center Management resources, and ten (10) departmental users from Neighborhood Services, Police, Streets, and PhillyRising.

In support of the PhillyRising initiative and community partner (neighborhood liaison program), the City of Philadelphia requires the use of marketing campaign functionality in the Salesforce Service Cloud platform for constituent service and outreach.

The Salesforce.com marketing campaign functionality allows a user to plan, manage, and track a campaign (an outbound marketing or outreach project) within Salesforce. The campaign can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.

Unisys will configure the Marketing Campaign functionality to provide the ability for the City to:

* Create marketing campaigns for:
  + Schedule and communicate neighborhood meetings electronically e-mail and Community Portal
  + Develop and distribute neighborhood event materials both print and electronic
  + Develop and distribute PhillyRising success stories both print and electronic
* Document and track key marketing campaign activities
* Establish outreach goals and objectives for each campaign and track campaign responses.

The marketing campaigns created for PhillyRising will focus on direct marketing efforts by the PhillyRising team to connect with citizens residing in the designated PhillyRising communities. To support this effort, Unisys will create custom fields, hierarchies, and reporting to assist the City in both conducting and measuring the effectiveness of these campaigns.

## Custom Fields

The custom fields Unisys is proposing are:

* **Toolbox Process**: These are the specific activities that the city is using to promote citizen engagement in the targeted areas. The field will be set up as a drop-down box initially consisting of the following values:
  + Citizen Engagement Academy
  + Large-Scale Volunteer Event
  + MAP Mural
  + Alleyway Cleaning Campaign
  + Domestic Violence Workshop
  + Neighborhood Liaison Training
  + Career Boot Camp
  + Computer Lab
  + Quality of Life Survey
  + Community Leader Social
  + Gardening Project
  + Health Fair / Outreach
  + Dream Drive
* **Campaign Type**: How the campaign reached out to the citizens of the community. This will also be a drop-down box with the initial values of:
  + Door-to-Door
  + Door Hangers
  + Mass Email
  + Mass Advertising
  + Targeted Email
  + Website
* **Lead Status**: Record any responses of a lead to a campaign activity. Possible drop-down box values are:
  + Contacted
  + Contacted / No Response
  + Registered
  + Registered – Attended
  + Registered – No show
  + Registered – Cancelled
* **PhillyRising Community**: This will track the PhillyRising community being targeted. The values in this field will expand along with the PhillyRising program, but will initially consist of:
  + Elmwood
  + Frankford
  + Haddington
  + Hartranft
  + Kensington
  + Kingsessing
  + Lawncrest
  + Market East
  + North Central
  + Penrose
  + Pt. Breeze
  + St. Hugh
  + Southeast
  + Strawberry Mansion
  + Swampoodle

## Hierarchy

Unisys will also create a hierarchy which will group the PhillyRising communities as follows:

* South Division
  + Point Breeze
  + Southeast
* Central Division
  + Market East
  + Strawberry Mansion
  + Penrose
  + North Central
* Northwest Division
  + Swampoodle
* Southwest Division
  + Elmwood
  + Haddington
  + Kingsessing
  + St. Hugh’s
* Northeast Division
  + Frankfort
  + Lawncrest
* Philly 2.0
  + TBD

## Response Tracking

Various methods may be used to track the target citizens’ responses to the PhillyRising outreach activities. Some of the methods discussed include:

* Website: Salesforce Web-to-Lead functionality will be utilized to create a web form that will provide a mechanism to track a campaign member’s response and status.
* Manual: If the campaign members respond via phone or other direct contact, agents will enter the citizen’s information directly into the campaign through ordinary Salesforce channels. This will also be adapted to mobile use for PhillyRising representatives working directly with citizens in the field.
* Mass: If responses are being collected from citizens gathered at an event, the information will be imported directly from a spreadsheet or other electronic file into Salesforce using campaign update wizards.

## Results Reporting

Different metrics for measuring the effectiveness of campaigns have been advanced by the city, primarily focusing around two subjects:

1. Crime Statistics
2. Quality-of-Life markers

To address these focus areas, Unisys will explore various methods accessible to the city to obtain data sets providing quantifiable measures of these metrics. Police statistics may be available from the Philadelphia Police Department or other reporting agencies, and could be loaded into Salesforce to track crime trends within the community’s targeted by the PhillyRising program, to compare the effectiveness in reducing crime and types of crime against the types of programs and responses to the programs offered to specific PhillyRising communities. ESRI/GIS functionality will be utilized to record Service Requests entered as Cases in the Salesforce environment, so that any change in the reporting or resolution of incidents can also be compared to the initiatives launched in the respective communities.

Metrics particular to the PhillyRising program will also be recorded and tracked back to specific outreach initiatives. These include attendance at events, as well as the community member’s attendance at and participation in follow-up events. Data will also be utilized to track the success the PhillyRising program is having in recruiting citizens to participate in the Neighborhood Liaison program.

Once Unisys has made these metrics available to the City through the Salesforce Campaign functionality, the city will be able to design and create custom reports and dashboards providing both historical and real-time information on the results of its efforts. These reports can be used to track both the cost effectiveness and net effectiveness of the different initiatives, and identify which Toolbox Processes are having the most impacts on the different communities.

# SOW Appendix C Requirements

| **Reference Number** | **Service Request Requirements** | **Type** | **Implementation Plan** | **How Provided** | **Workshop Notes** |
| --- | --- | --- | --- | --- | --- |
| 5.01 | The solution provides ability to generate reports based on a set of key performance indicators as designated by City of Philadelphia. | SR | Salesforce Service Cloud application will be configured to implement this requirement | Salesforce Sales Cloud | Metrics will be provided to track the effectiveness of PhillyRising outreach efforts. |
| 5.39 | The solution provides dashboard capabilities that will display reporting information based on user's defined role within the CRM system. | TP | Salesforce.com CRM Dashboards and Chatter Usage Dashboard app, from the App Exchange will be installed in Salesforce Service Cloud application to implement this requirement | Salesforce Sales Cloud | PhillyRising users will have access to reports and dashboards pertaining to PhillyRising campaigns. |
| 5.40 | The solution provides ability to customize dashboard information based on user's desired level of information. | SR | Salesforce Service Cloud application will be configured to implement this requirement | Salesforce Sales Cloud | PhillyRising users will have access to reports and dashboards pertaining to PhillyRising campaigns. |
| 5.41 | The solution provides real-time analytics to capture key reporting and metrics. | SR | Salesforce Service Cloud application will be configured to implement this requirement | Salesforce Sales Cloud | PhillyRising users will have access to reports and dashboards pertaining to PhillyRising campaigns. |
| 5.42 | The solution provides the ability to assign and/or link management summary reports for comparison over time and benchmarking against other municipalities. | SR | Salesforce Service Cloud application will be configured to implement this requirement | Salesforce Sales Cloud | Custom reports containing historical data from campaigns may be created and stored for comparative purposes. |

# Action Items – The City

* The City of Philadelphia’s PhillyRising subject matter experts will assist Unisys with understanding the data capture requirements for each marketing campaign type.
* The City of Philadelphia will responsible for determining which outreach campaigns to enter and track in Salesforce and enter the outreach campaigns entering outreach campaigns into Salesforce.
* The City will be responsible for generating any printed material and providing the fulfillment services for getting that material out to the intended audience.
* The City will provide Unisys with the Email Templates for the Salesforce Sales Cloud.
* The City of Philadelphia’s subject matter experts will assist Unisys with understanding the ‘To Be’ business process.
* The City of Philadelphia will designate resources to review and approve the Business Configuration Design Document per the agreed upon Project Plan.

# Action Items – Unisys

* Conduct one (1) PhillyRising marketing campaign requirements session.
* Conduct one (1) PhillyRising marketing campaign design session.
* Develop, distribute and review a Business Configuration Design Document. The Business Configuration Design Document details the design of the Salesforce Service Cloud platform and the Community Portal for the City of Philadelphia.
* Obtain sign-off and approval to proceed from the designated departmental representative.
* Configure the Marketing Campaign per the approved Business Configuration Design Document.
* Configure the Salesforce Service Cloud and Community Portal per the approved Business Configuration Design Document including:
  + Core Salesforce Service Cloud Marketing Campaign Configuration
  + Email Templates
  + Users
* Unit test the configurations.