

Public Engagement and Customer Relationship Management System

FY2024 Request: \$2,500,000
Reference No: 64681

AP/AL: Appropriation

Project Type: Information Technology / Systems / Communication

Category: General Government

Location: Statewide

House District: Statewide (HD 1 - 40)

Impact House District: Statewide (HD 1 - 40)

Contact: Hannah Lager

Estimated Project Dates: 07/01/2023 - 06/30/2028

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Brief Summary and Statement of Need:

The department will procure a customer relationship management (CRM) system to improve customer interactions with the department and streamline how divisions manage customer contacts. The system is anticipated to include customer self-service options; chat or other messaging for customers to interact with the department; collaboration and workflow for inquiries; and contact analytics; among other features. The department may also purchase integrations for licensing, enforcement, grants, payments, or other topic areas to leverage the new software most effectively across the department.

Funding:	FY2024	FY2025	FY2026	FY2027	FY2028	FY2029	Total
1175	\$2,500,000						\$2,500,000
BLic&Corp							
Total:	\$2,500,000	\$0	\$0	\$0	\$0	\$0	\$2,500,000

<input type="checkbox"/> State Match Required	<input type="checkbox"/> One-Time Project	<input type="checkbox"/> Phased - new	<input type="checkbox"/> Phased - underway	<input type="checkbox"/> Ongoing
0% = Minimum State Match % Required		<input type="checkbox"/> Amendment	<input type="checkbox"/> Mental Health Bill	

Operating & Maintenance Costs:

	<u>Amount</u>	<u>Staff</u>
Project Development:	0	0
Ongoing Operating:	0	0
One-Time Startup:	0	0
Totals:	0	0

Prior Funding History / Additional Information:

Multiple system replacement projects are underway in the department. This project is anticipated to run side-by-side with those projects to allow those divisions to leverage the newer customer communication tools. When the CRM is in place, integrations into other department systems (grants, corporations, etc.) will be phased.

Project Description/Justification:

The department provides services to over 90,000 business licensees, 97,000 professional licensees, and 80,000 corporate entities - in addition to specialty licenses like alcohol, marijuana, or insurance licenses. Many of those customer groups overlap: an alcohol licensee may also have both a business license and a corporate registration; or an insurance office may also have a corporations filing and multiple licensed insurance agents. A department-wide CRM will facilitate more meaningful and efficient customer interactions, which will allow divisions to capture efficiencies.

The department anticipates a phased development and rollout of the CRM system. The base customer communication tools will be rolled out first, to allow divisions across the department access to more modern communication tools. Additional system integrations will be phased from that point.

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Anticipated integrations include connections to Corporations, Business, and Professional Licensing systems to allow for additional customer self-service; connections to Community and Regional Affairs' eGrants system; and other systems.