



BY CORY FLEMING AND PAULA STALLCUP

CASE STUDY:

Evolution of San Antonio's 311-Customer Relationship Management System

The city of San Antonio, Texas, implemented a home-grown 311-CRM system developed by the city's IT team for improved customer service early on in 2004. In 2006, ICMA selected San Antonio for a case study series, "Call 311: Connecting Citizens to Local government," which also included Minneapolis, Minnesota; Lynwood, California; Los Alamos County, New Mexico; and Hampton, Virginia.

The case studies were designed to help local government professionals and managers understand how a 311-CRM system works and what benefits their organization might realize from the selection and implementation of a well-designed, centralized customer service system, using a customer relationship management (CRM) solution. ICMA researchers examined how these local governments approached the following elements in designing their respective 311-CRM systems:

- System functionality and major features.
- Performance measurements and service provision.
- Citizen engagement and public outreach.

A 311-CRM system allows residents to easily connect with their local government for information and service requests. Over the years, San Antonio has continued to make improvements and implemented technologies that assist with providing additional information to residents. This case study provides an update of the improvements San Antonio has made to its system.

SYSTEM FUNCTIONALITY AND MAJOR FEATURES

San Antonio has studied local government customer service for nearly two decades. City leaders do not look at data just related to customer service—such as volume of contacts received from residents or percentage of service level agree-

ments reached. They also examine data related to citizen expectations and satisfaction rates. What the city's analysts have found is that a centralized system is only one part of creating the city's desired customer service experience for residents. Determining the level of customer service is the first step. Once that experience is defined and expectations set, the information collected can be used as a base for designing and/or enhancing a system.

On August 15, 2018, San Antonio launched a new mobile app as a way to enhance the channels available for citizens to engage with the city. The San Antonio 311 Mobile App (<https://www.sanantonio.gov/CustomerService/MobileApp>) functions very much like a private sector CRM solution in the manner it handles a delivery order. The city is implementing a standardized workflow process that all services will follow regardless of what a request entails.

In the private sector, an individual will receive an email notice advising that an order has been received. The next step is shipment, then delivery, and finally an evaluation of service. Even though requests and services are different in every department, the process or steps involved remain the same. In the public sector, a standardized process using a CRM for tracking information and service requests can work the same. Most of the steps involved are applicable to every department. In code enforcement, an initial investigation may take a few days whereas the initial investigation for a street repair involves picking up the request and sending out a field crew. The tasks are going to be different, but the steps involved are all consistent.

San Antonio's new mobile app has three popular features, including an interactive map, social media elements, and a gamification feature that make the app unique. A local San Antonio small business, Cityflag, developed the app with the goal to enhance this channel and increase citizen engagement.

Interactive map. An interactive map allows users to determine where mobile app reports, 311 calls, and other communications are coming into the city. All calls for service are included in the interactive map via “flags,” which allow neighborhood leaders to be aware of service needs in their respective areas. Once services are complete, they are documented by a change in flag’s color; a flag is deleted from the map after three days upon closure.

Social media. The city has had a mobile app in place since 2013. However, the new app offers additional capabilities. It works like social media, for example, in that people can follow other users; scroll and view other users’ reports; “LIKE” each other’s reports; as well as share on Twitter and Facebook.

Gamification. Through the app’s gamification element, users can collect points. If an individual submits or votes for service requests, he/she receives points toward a virtual badge which is similar to getting to the next level in a video game. If news is shared on Twitter or Facebook, more points are awarded. When a case is closed, an app user receives his or her total points, all to earn virtual badges. Right now, an individual can’t earn dinner with the mayor, but the city is looking into options for the future as leaders want to reward people for using the app and being engaged with their city. **(They are hoping to institute physical prizes for higher scores, but that’s a ways off right now.)**

San Antonio currently does not capture significant demographic information through the CRM intake system, however, the city does receive feedback through online surveys that are returned when a request is submitted. The city was able to collect about one year of data from surveys, enabling San Antonio to create a “heat map” based on 600 responses received from the survey. By analyzing zip codes to determine what kind of requests were coming from different locations in and around the city, analysts compared those results to all the requests that the 311-CRM contact center took in that same year. The purpose was to determine if the level of citizen feedback was similar to where the complaints were being reported.

What the city hoped to learn was whether residents’ feedback matched the calls being received. Over 50 percent of the people taking the survey were older than 70 and 35 percent were in the 65+ age range. Analysts speculate that younger people are busy with their families, whereas older citizens have more time available to participate in such requests and can be more engaged in their neighborhood. With increases in homeownership among younger residents, the system has started to bring in a younger audience. When people put down roots, they become invested in the community.

PERFORMANCE MEASUREMENTS AND SERVICE PROVISION

Additional data is now much more readily available from the 311-CRM system. In October 2018, Paula Stallcup, senior manager for the Customer Service-311 Office, spoke at a neighborhood meeting in northwest San Antonio. Oftentimes, community leaders ask her to bring some statistics for

their neighborhood. Before she spoke to them about the data they requested, however, she asked residents to tell her what they thought the problems were in their neighborhood. The 311 data showed another story because the city was not getting calls on those perceived problems; residents are wrong about 66 percent of the time. Oftentimes neighbors think they know what the specific problems are in their neighborhood, but the perceptions don’t always match up with the data.

“I always tell community groups is if they see a concern that needs to be addressed, they need to report it, so we can go do something about it. The service requests from residents dictates what takes priority,” says Stallcup.

San Antonio measures customer satisfaction every other year through a resident survey. In 2018, the Customer-Service-311 Office landed in the top five departments for citizen satisfaction and came in second for most improved ratings. That same year, the city also held some user design-work sessions inviting residents to share their experiences with the mobile app. Through this process, city analysts found that residents have high expectations of the city. When residents are directly impacted by services (e.g., trash service, aggressive animals), they want the situation fixed immediately. Analysts also reaffirmed that residents want to be advised of the outcome of their service request since they took the time to report the issue.

Residents also said that they want to become familiar with city rules and regulations, which will help them understand the procedures in responding to requests. City employees can talk to each other all day long about what they do and why they do it, but the city doesn’t have a good way to communicate all the requirements and restrictions that govern the operations of every city department. As part of San Antonio’s CRM upgrade in 2019, the city outlined those expectations in laymen’s terms. These processes will now be available to residents through an enhanced online portal that will define expectations as to how the city will address specific concerns.

As part of the upgrade project, Stallcup notes, “We have to be more open and transparent about how the city does business as an organization. The feedback has shown that residents want to help, but they also want to know what the city’s processes are.” City personnel do provide some education when time permits, explaining how the city typically responds to a certain type of request, for example, state law requires this action be taken or the city code compels that this action be taken. When city processes are explained to people, they better understand why issues are addressed in that manner.

Who Uses San Antonio 311 by Age

- 30% were 65+ in age
- 64% over 60
- 72% from over 50
- 20% were 30-49 age bracket – Usually much lower percentage

CITIZEN ENGAGEMENT AND PUBLIC OUTREACH

The San Antonio 311 Mobile App (<https://www.sanantonio.gov/CustomerService/MobileApp>) was developed as part of the San Antonio's Smart Cities initiative three years ago. The goal in adopting the app was to engage a difference audience. With demographics in San Antonio changing rapidly, community leaders want to determine how to best encourage greater citizen engagement. The goal is to provide residents with another communication channel of choice.

What is a “communication channel of choice?” There are always those residents who want to talk to a live person. And there is another segment of the population that would rather connect online. Finally, there's a group of people who want to do everything on their mobile app. All three channels of choice – mobile app, online, or phone call—should offer the same information to residents, as well as a similar look and feel no matter which channel is being used.

Information in any local government flows in a push-pull manner. Information is taken in from residents, but it is also pushed out to residents. Stallcup notes that her department takes in information every day, but it also pushes information out in the form of weekly reports to council members who want to be aware of the kinds of calls that are coming into their districts. The same report for council members is also sent out to city departments. This information includes service level agreement (SLA) compliance, SLAs are agreements made by Service Departments with San Antonio 311 to track performance. The Public Works Department might have a SLA to have a pothole fixed in 72 hours after it has been reported and now this information is also available to the residents using the mobile app.

In 2017–18, the city collected additional data from citizens who had specific questions and wanted to know what happened to their request for service. According to Stallcup, “A resident calls into 311 and then what happens? What did the city exactly do with that request? Did the city fix the pothole? Catch that stray animal? Was that dog quarantined? Did you give a citation for the junky car on the street?” Such a system is what San Antonio is building today.

At present, people can determine if a request to the city has been “closed.” Without knowing the city's processes, however, that information is meaningless. For example, a closed ticket for a stray animal request doesn't mean an officer has been sent to pick the animal up. If someone calls in with a code enforcement complaint, that's not a problem that can easily be addressed in a day or two. These are 30- to 40-day processes. If the citizen receives an email indicating that the ticket has been closed, but he or she knows the problem hasn't been resolved, that's when questions arise about what is actually happening.

San Antonio's CRM vendor is building a model that demonstrates how the new web portal will provide additional transparency, where residents can go online and check to see what's happening with their requests. Users will be able to track where their request is in the standardized workflow since that last major task was completed, as well as receive additional notes with outcomes of the request. All city

departments are establishing their workflow and processes using the same standardized format, which will be viewable to citizens online through a portal as well as the mobile app. Regardless of the channel of choice, a resident can get the same updates and service request outcomes.

Overall, the number of contacts from residents is increasing. Stallcup reports the city is processing more service requests than information requests. When initially established, San Antonio 311 had 25 percent to 75 percent ratio of service requests to information requests. The nature of the contacts being received by the 311 center are more about concerns they have rather than asking for information. As communication practices change and residents are able to get more information online, the city has seen the ratios change. Today, 55 percent of contacts are for information and 45 percent are for service requests. In terms of usage, residents have downloaded the new app more than 14,000 times submitting over 25,000 requests for services with more than 6,000 active users. City officials hope to build the number of active users to 10,000.

GETTING THE MOST FROM DATA

Nationwide, there is a movement in local government that is centered around data and how to use the information to create smarter communities. In San Antonio's case, the city has a tremendous amount of data that begs many questions. To answer these questions, the city been working with a university professor in the area to determine how to get the most out of the data. The city's new open data platform, along with data-thons, bring computer programmers and data geeks together to solve local government challenges using data that is more accessible and easily available. San Antonio's 311-CRM system is dedicated to building a level of trust and confidence for residents in city operations.

RESOURCES

In 2006, ICMA began research on the first National Study of 311 and Other Centralized Customer Service Systems. The City of San Antonio provided the first case study on the use of such systems by local governments. Now, in 2019, we return to San Antonio to see how San Antonio is using its system for research for the city. Download the original report at [icma.org/documents/san-antonio-texas-311-case-study](https://www.icma.org/documents/san-antonio-texas-311-case-study).



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