

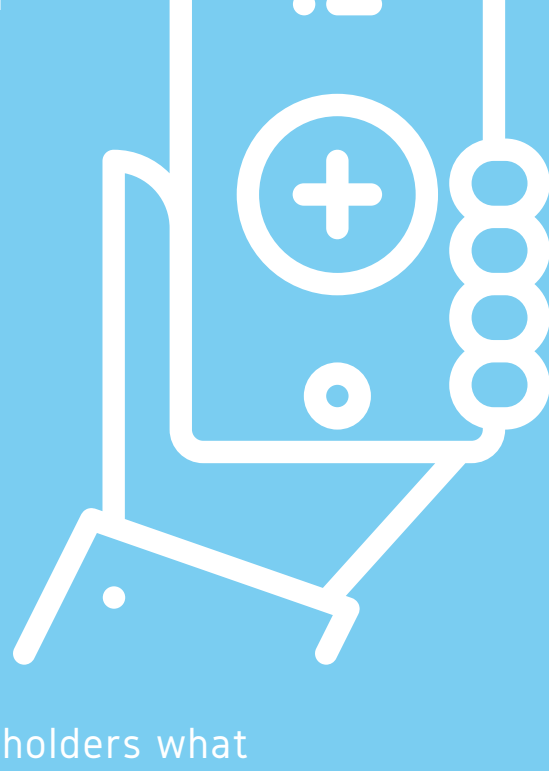
# 2021 DISTRIBUTED CRM/311 SOFTWARE SELECTION GUIDE



## GET A HEAD START

The team here at Comcate has met with hundreds of local government agencies and we've merged their collective wisdom into a CRM/311 evaluation guide for you.

We've covered the questions you should ask yourself, your team, and your vendors while highlighting the features, functionalities, platform strengths, and security elements that are key to success.



## DEFINE SUCCESS

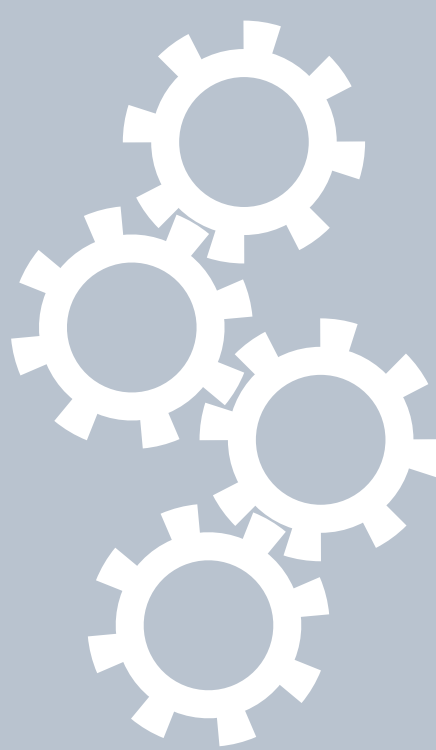
Starting with the end in mind, ask stakeholders what success looks like to them. Here are a few examples:

- Share successes with residents, council, and municipal leaders
- Make better, data-driven decisions
- Increase resident engagement
- Give departments and teams tools to be more accountable
- Streamline workflows to get more done, faster
- Never lose a resident request
- Know the status every request with a few keystrokes
- Provide 24/7 access to local government

## AUTOMATION

Automations free staff from repetitive tasks like assigning requests while ensuring that procedures are followed consistently.

- Does the solution automate the routing of service requests?
- Is information auto-populated (e.g. GIS location information, request categories etc.) when possible?
- Are new service requests automatically acknowledged?
- Are updates sent automatically when requests are updated?
- What skills are required to configure workflows?



## SERVICE REQUEST MANAGEMENT

When managing service requests it's important for staff to have historical context for the request they're managing.

- Does the solution have a resident record that lists previous service requests?
- Is it easy to access a request history?
- Are there tools to communicate internally and externally about a request and are those communications automatically captured?



## INTEGRATIONS

Data should flow to where it's needed most whether that involves sending service request data to an asset management system or pulling information from a GIS platform.

- Does the software integrate with 3rd party applications and data sources?
- Are the integrations productized (turnkey solutions) or custom one-time solutions?



## EASE OF USE

Software that's easy to use is embraced by residents and staff.

- Does the solution look and feel like modern software?
- Is the software a pleasure to use across desktop and mobile devices?
- Is the user interface intuitive for new users, requiring less training?



## SECURITY

Hackers abound requiring all systems to be secure.

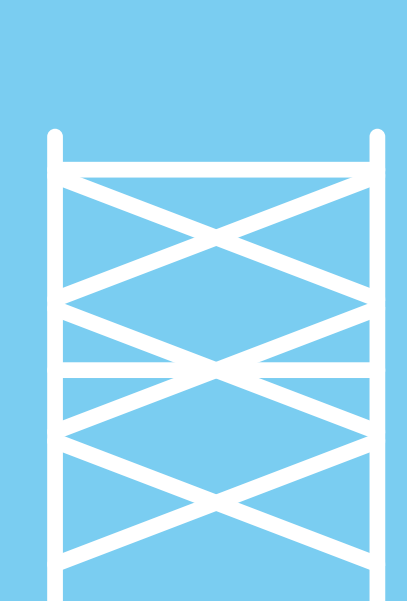
- How long has the cloud provider been managing security on an enterprise-scale?
- Does the cloud provider employ cloud experts who are knowledgeable about security throughout the entire technology stack
- What security guidelines does the provider follow?



## INFRASTRUCTURE

Know who is responsible for maintaining and updating the solution - you or the vendor.

- Who manages network connectivity, firewalls, log file management, web application firewalls and access and identity management?
- Where is the technology hosted?
- Do clients receive all updates to the application? Is there a cost?
- Does the infrastructure support automated recovery in case of application failure?



## PRICING / TOTAL COST OF OWNERSHIP

Understanding first-year and ongoing costs determines whether software is a good value.

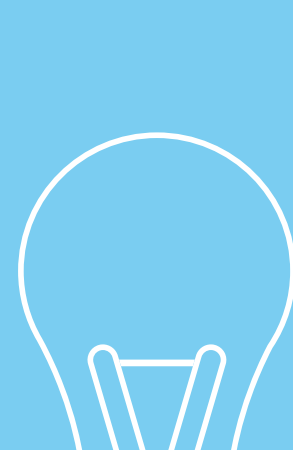
- What are the pricing models and tiers (e.g. per-seat licensing, or population-based)?
- Are there any up-charges, additional product charges, server license charges, or maintenance charges?
- Are there charges for usage above preset limits or for storing files?
- Are there charges for integrating applications and data sources?



## SUPPORT

Support before, during, and after the sale has a lot to do with achieving success.

- What type of customer support is included with the solution?
- Are extended, phone-based technical support packages offered?
- Do they provide a knowledge base, case portal, or other online resources?
- Will you have dedicated implementation and customer success resources?



While no two municipalities are the same, this guide is a good jumping off point for your selection committee. And kudos to you for developing a plan that'll set your agency up for success.

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