



INFORMATION TECHNOLOGY

# **Finance and Debt Committee**

## **November 29, 2023**

# Introductions

Anne Bennett – Director of IT

Lauren Schultze – IT Project Manager

Jenny Jaqua – Customer Service & Engagement Commissioner

# Agenda

- IT Strategy Review
- Application Investments
- Customer Service Update

# Strategic Priorities

The foundation of all ICT projects is to improve **operational efficiencies** (systems & processes).

## City Initiative

## Department Initiative

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### Customer Service

Employees take pride in providing excellent/outstanding service to our citizens.

Improve and expand service to our customers

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### Basic Services

Provide basic services to citizens in an effective and efficient manner.

Manage risk (security and reliability)

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### Quality Investments

Make investments that improve the quality of life for people who live, work, and play in Toledo.

Investing in applications

# Application Investments

- Various department-level investments
- Key Enterprise Investments
  - Tolemi – Building Blocks
  - HCM – Human Capital Management
  - CRM – Customer Relationship Management

# HCM

## **Budget:**

\$3.2 million (CIP – 5 years)

## **RFP:**

Consultant: BerryDunn

3/4/23 – 4/18/23: 13 responses

Top 4 identified: Two-day demo with each vendor; reference checks

Implementation: ~12 months

## **Potential Costs:**

\$2.9 - \$5.7 million (5 years)

# CRM

## **Budget:**

\$1.5 million (CIP – 5 years)

## **RFQ:**

7/27/23 – 8/22/23: 14 responses

Top 3 identified: Demos and references complete

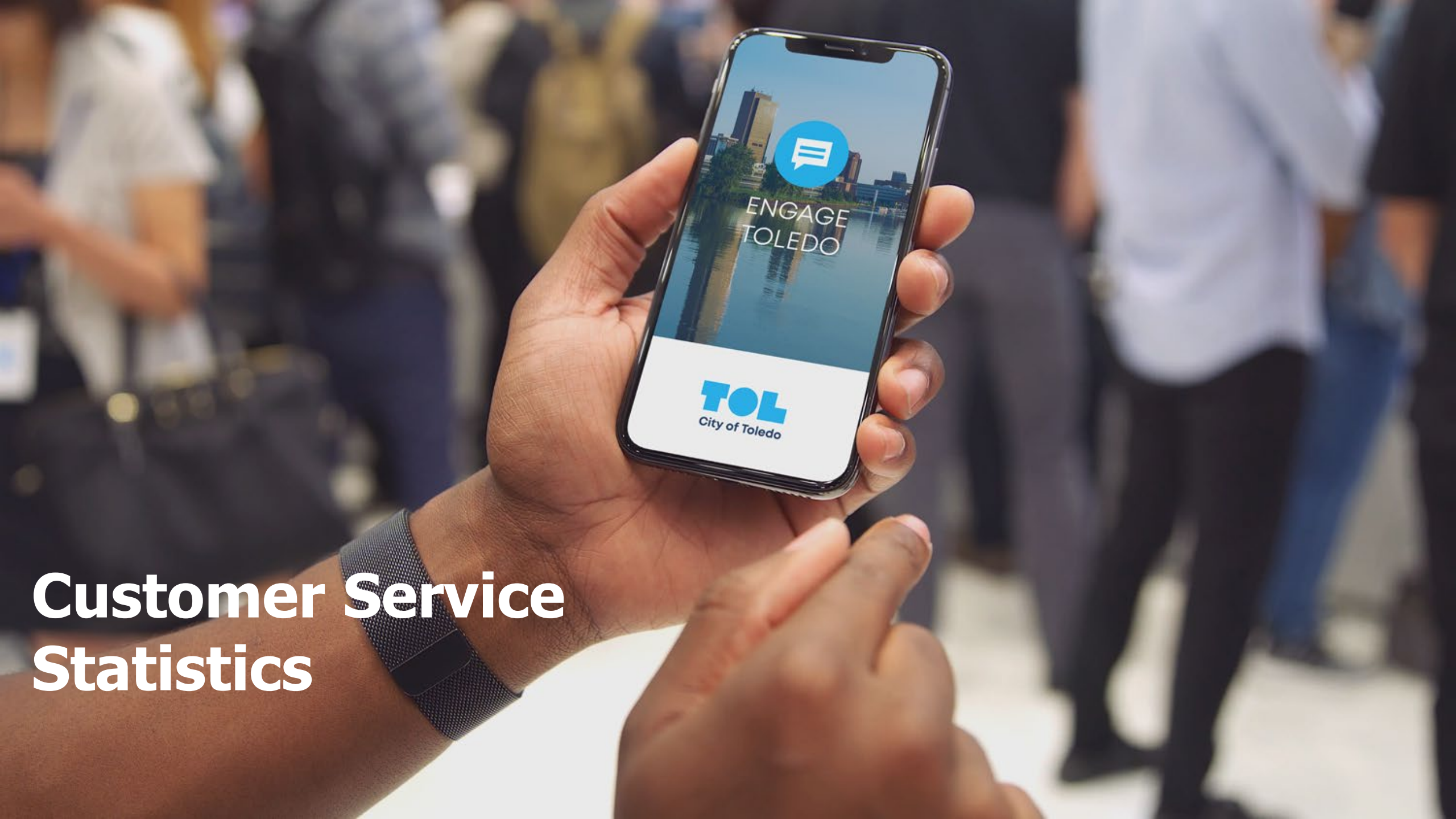
Reviewing SAP S/4

Implementation: ~6 months

Releasing RFP for final/best pricing

## **Potential Costs:**

\$62,000 - \$270,000 annually + implementation



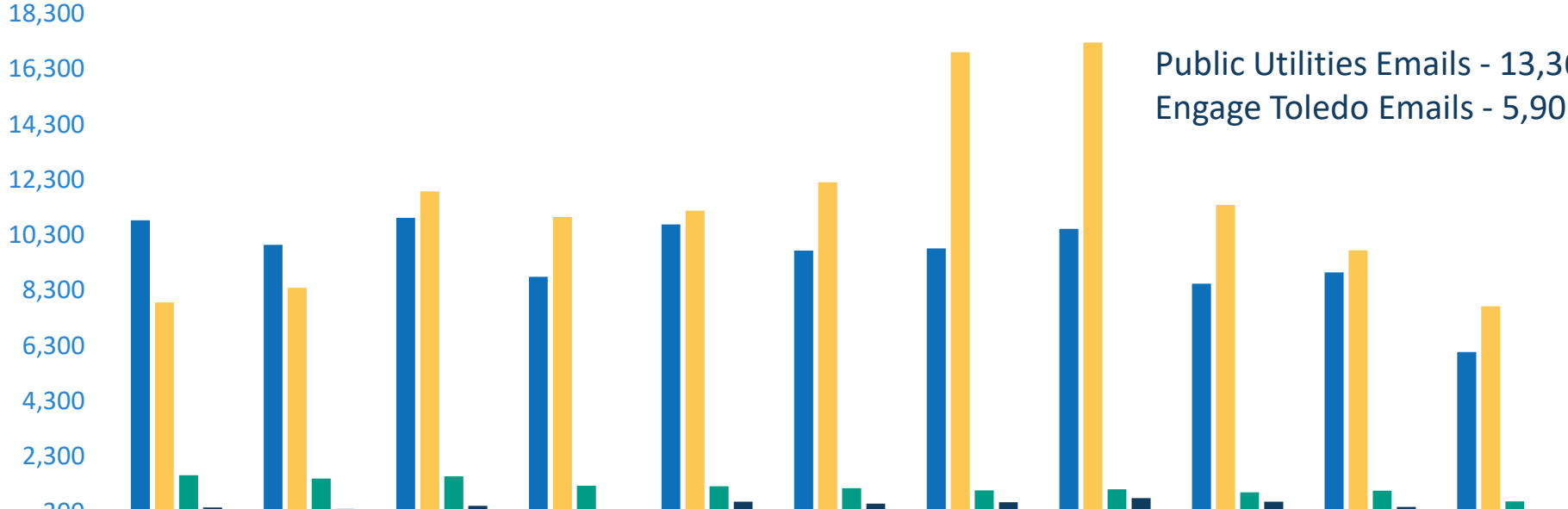
# Customer Service Statistics



# 2023 Call and Email Statistics, YTD through November 27<sup>th</sup>

Public Utilities Calls - 104,852  
Engage Toledo Calls - 125,515

Public Utilities Emails - 13,363  
Engage Toledo Emails - 5,902

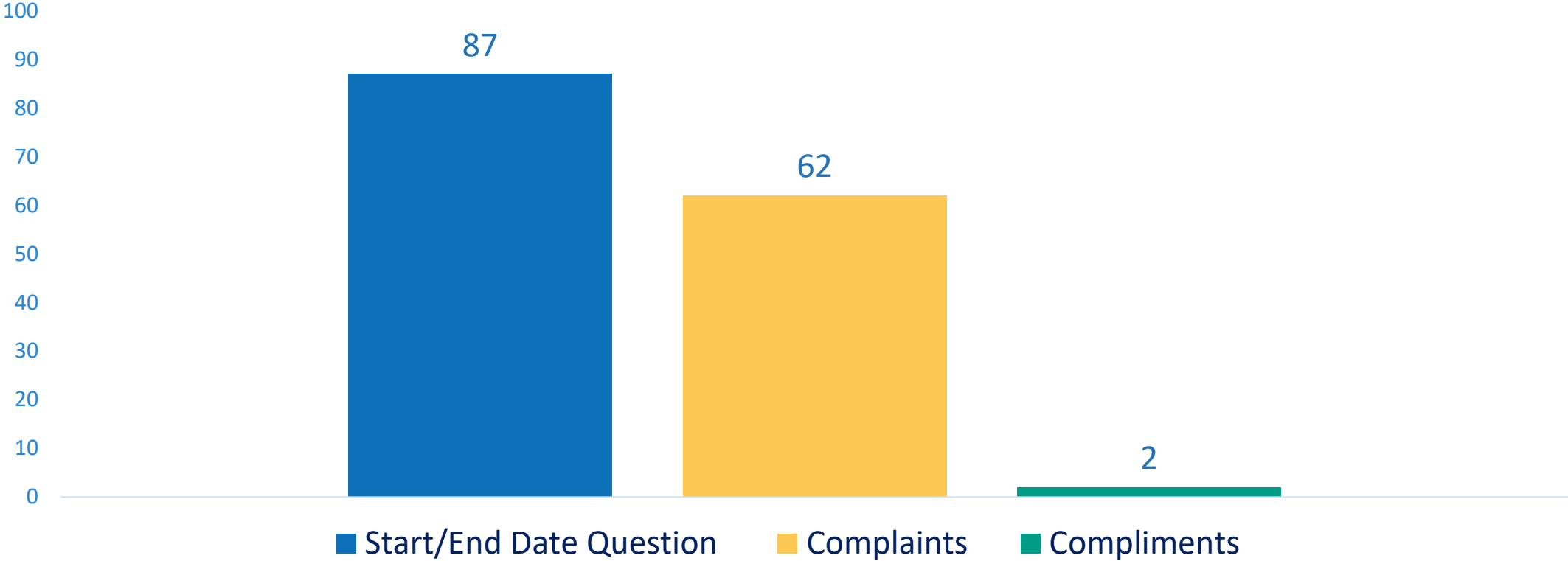


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
■ Inbound Calls - DPU	10,831	9,948	10,925	8,792	10,687	9,744	9,818	10,530	8,541	8,956	6,080
■ Inbound Calls - Engage Toledo	7,873	8,399	11,882	10,949	11,182	12,204	16,898	17,251	11,391	9,752	7,734
■ Emails - DPU	1,628	1,507	1,594	1,251	1,234	1,165	1,084	1,126	1,010	1,078	686
■ Emails - Engage Toledo	463	421	527	255	671	610	652	805	679	489	330

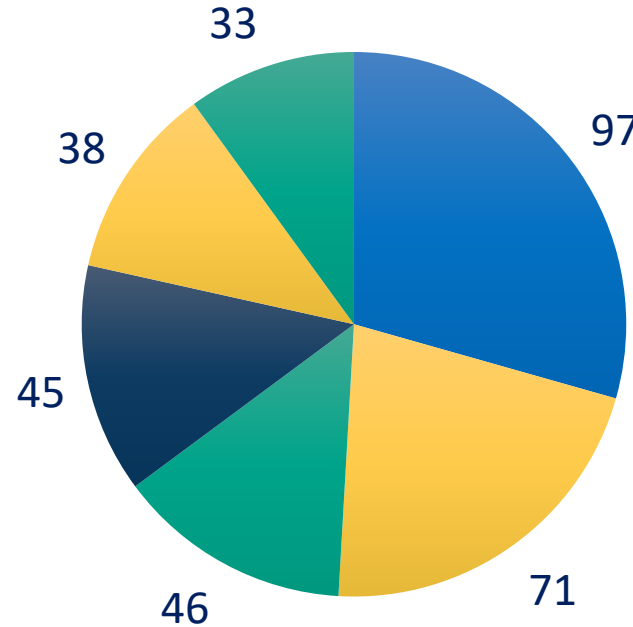
■ Inbound Calls - DPU    ■ Inbound Calls - Engage Toledo    ■ Emails - DPU    ■ Emails - Engage Toledo

# Leaf Collection Season Data

## November 1 – 27, 2023



# District Three Top Requests November 1 – 27, 2023



■ Structure Concern

■ Parked Vehicle Concern

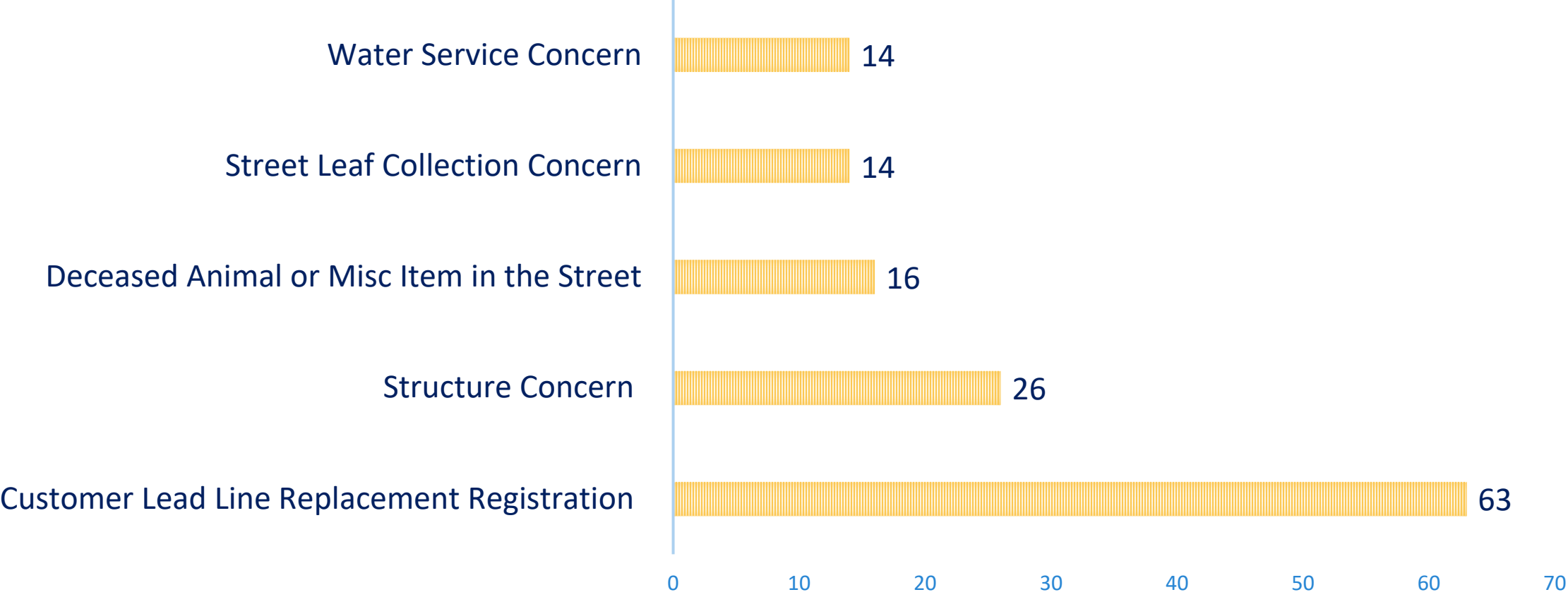
■ Inbound Call General Info

■ Customer Lead Line Replacement Registration

■ Water Service Concern

■ Blight Concern

# District One Top Requests November 1-27, 2023



# Customer Service Updates

- Launched our new call recording software
- We're progressing with our CRM RFQ. We are investigating our current portfolio to determine the processes and functions used by our agents in our utility billing software and those in Cityworks. Our focus is to ensure operational efficiencies and value to our residents
- We're meeting with each division leadership for the operations that we support to renew service commitments for 2024
- Developing a roadmap action plan for customer service to execute in 2024



**Thank you.**

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