

The background of the slide is a dense, dark mosaic of many small, grayscale portrait photographs of diverse people. The Infusionsoft logo is positioned in the top left corner.

Infusionsoft®

# CRM for Government

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Product Marketing Manager, Infusionsoft



## Hi, I'm Justin

- Professional background in software, startups and marketing
- Founder of Ampersand Group and [ProductMarketingSummit.com](http://ProductMarketingSummit.com)
- Dangerous & expensive hobbies like racing cars, flying planes and voicing my thoughts
- If I could be any animal...





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## About Infusionsoft

- Founded 2001
- Venture backed
- 30k customers, \$100MM revenue
- Awards
- All-in-one marketing automation for small & medium business
- Football field & Cereal Bar



What is the one thing  
that you want to leave  
with?



## What's a questions do you have?

- How to deal with the angry, verbally abusive constituent without engaging...how to talk rationally to that person when their rant is anything but rational. How to separate yourself so at the end of a day filled with rude calls like this, you still have faith in humanity...?
- What's the best way to keep track of constituent services? Best databases? What information is really the most useful to keep track of? How do you keep constituent service staff motivated? What technology should we make sure to use? Not use?
- How do deal with the angry constituent?

# Overview of CRM

Progression, technology & value



The database is not a  
new thing!

SCHLAGWORTKATALOG

BAY - BEE

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SCHLAGWORTKATALOG

BUCHW - BUE

SCHLAGWORTKATALOG

*Bibliotheken:*

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...ing Services	647-649	316	Mental-Health Services See Health Services-Licensed	316,317	...
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...ing Services	669	916	Marriage, Family, Child & Individual	669	...
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<b>Contractors</b>			<b>Messenger Service</b>	669	...
...ry-Products See			<b>Metal-</b>		...
...Sand & Gravel			Buffing & Polishing See	657	...
...restoration See			Metal Finishers	814	...
...Building Restoration			Plating		...
...Preservation			Buildings See	197,198	...
...Pressure Washing			Buildings-Metal	656	...
...Equipment			Cleaning		...
<b>Sandblasting</b>			Cleaning Compounds See	282	...
<b>Masquerade Costumes See</b>			Cleaning Compounds		...
<b>Costumes-Masquerade &amp;</b>			Cutting See	657	...
<b>Theatrical</b>			Metal Sawing & Cut Off Service	961	...
...nt & Supplies			Steel Processing	1077	...
...			Welding	656	...
...			Cutting Containers & Systems		...
...			Cutting Tools See	642	...
...			Cutting Tools Dealers	1010	...
...			Machine Tools	656	...
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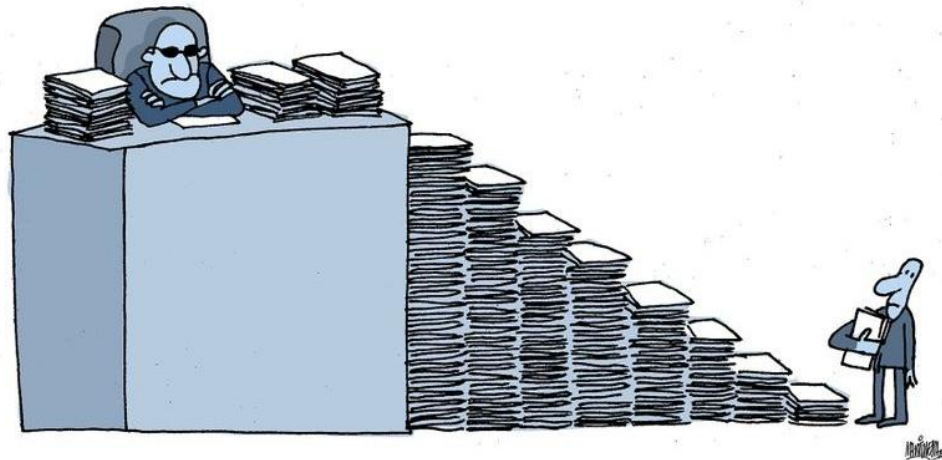






# How can a government use CRM?

- Constituent contact center (311)
- Work order management
- Case management
- Outreach
- Management support





# What does successful CRM look like?

## For the constituent

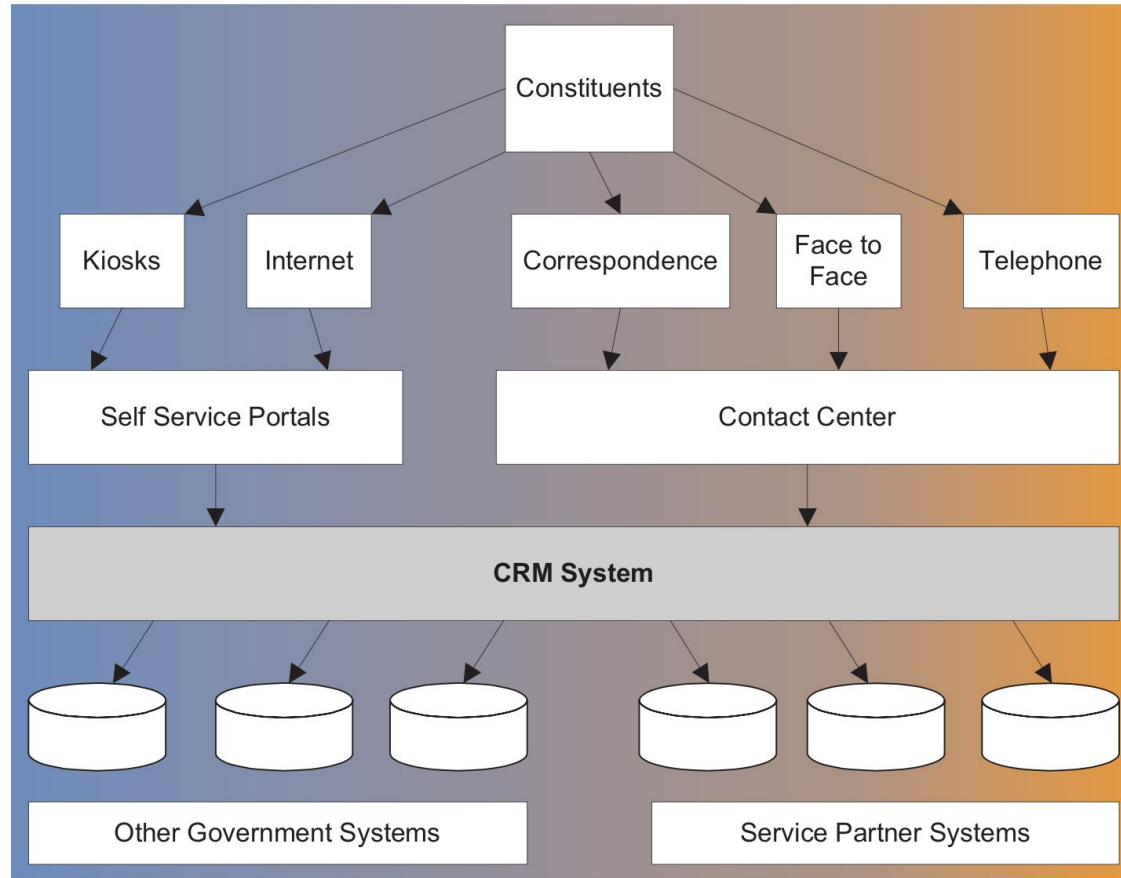
- Shorter wait times to contact government representatives
- Less frustration in finding the required services
- Outcomes that are delivered when promised
- Higher engagement
- Greater satisfaction

## For the government

- No more lost anything
- Knowing your constituents
- Engaging them with the right information, at the right time, using the right method
- Mundane tasks are automated, freeing your staff to focus on impactful activities



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## CRM early adopters

- City of Chicago, IL
- City of Albuquerque, NM
- DeKalb County, GA
- City & County of Denver, CO
- City & County of Indianapolis, IN
- City of New York, NY



Citizens have much more multi-faceted relationships with government than the word 'customer' implies



CRM and 311 are not  
synonymous

CRM refers to a  
discipline of  
constituent-focused  
management of  
government

A database, by itself,  
is just a database

The Infusionsoft logo is displayed in white text on a solid green background at the top of the slide. The background of the entire slide is a dense, dark gray mosaic of numerous small, semi-transparent photographs of diverse people, creating a textured, community-like effect.

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# Automation

A database is just a database

Constituent relationship management is the **combination** of people, processes and technology used to deliver superior service to the constituent.



What are things like for  
you right now?



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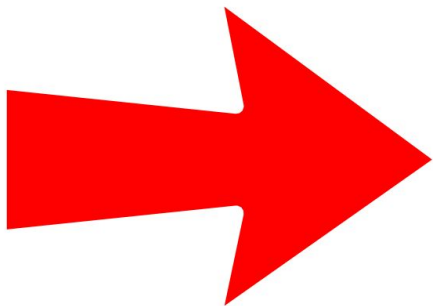








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## What if I told you a CRM could...

- Hold a knowledge base so when a constituent calls asking for information, a CSR clicks a button and the system sends an email containing the desired information to the constituent
- Also includes a brochure and details on upcoming events related to that topic
- If the constituent still doesn't have the answer he's looking for, can click a link in the email, type his question, and it shows up in the CSR's inbox and adds the constituent to her list of phone calls for the next day

...all automatically



## What if I told you a CRM could...

- Automatically move cases from one CSR to another once the first is finished
- Include all relevant information, files and call notes so the next CSR is fully up to speed on the case
- Automatically send emails to the constituent to gather additional info or update the constituent on case progress
- Give managers visibility into where cases are at and estimated time of completion, so they never have to ask and you never have to update them
- Send a report to a manager and the constituent when the case is complete

...all automatically



## What if I told you a CRM could...

- Track the interests of your constituents based on what they click in emails, their call history or what pages they're looking at on your website
- Notate that and then segment your entire database based on those interests
- Allow you to send emails with information to only the constituents who are actually interested in that information (instead of a mass email to everyone)
- If it's critical information, show you who didn't open the email and automatically notify you to call them

...all automatically



## And more...

- Capture & organize information for anyone visiting your website
- Integrate with the systems of other departments, partners or governments
- Let you automatically bill and collect payments
- Notify the proper person when a constituent takes an action (or doesn't)
- Call constituents
- Generate reports on constituent interests or actions, the performance of marketing campaigns, the activities of your staff
- Manage the entire constituent inquiry pipeline
- Delegate cases to the right person

...all automatically

With automation, the system  
(and your constituents) can  
do most of the work for you

Automation does not mean  
robotic or cold





# What's next for you?

Take it a step at a time

Don't think about what it's like today. Think about what you want it to look like tomorrow.



## If you're still running off paper...

- Make a business case identifying vision, business issues, success factors, benefits, KPIs, initial & ongoing investment, and expected ROI
- Identify an executive sponsor
- Create an effective management and governance structure
- Build & sustain momentum using a phased approach
- Obtain commitment & execute



## If you have a CRM but are looking for your next step...

- How can you be more proactive with outreach?
- What needs to change?
  - Understand and analyze the current process
  - Redesign the processes to realize the vision/goals
  - Identify gaps between the current & redesigned processes
  - Develop technology requirements and understand the changes
  - Develop a plan to implement
  - Execute
  - Periodically review & improve the new process



## If you're a pro, have you considered...

- Expanding the information collected in constituent records and history?
- Implementing geospatial capabilities or attributes?
- Optimizing your campaigns and connecting them to each other to produce a natural flow, progression or cross-pollination for the constituent?
- Creating a self-serve constituent portal and integrating it with your CRM, to remove even more workload from your staff?
- Explored integrations with your vendors, partners, agencies or governments to automate even more?



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Questions

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