SeeClickFix

311 CRM

POWERED BY CIVICPLUS

Columbia, Missouri

PRESENTED BY:

Eric Petersen, Account Executive

June 12, 2023
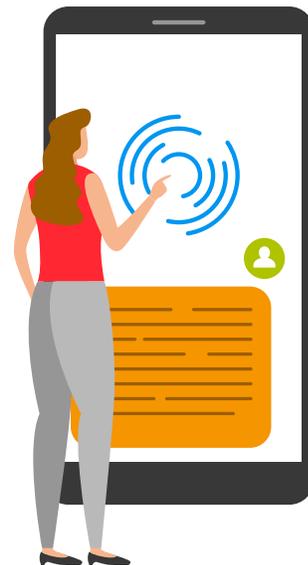
Powering and Empowering Government

CivicPlus Company Overview

CivicPlus History

CivicPlus began in 1998 when our founder, Ward Morgan, decided to focus on helping local governments work better and engage their residents through their web environment. Over the years, CivicPlus has continued to implement new technologies and merge with industry forerunners to maintain the highest standards of excellence and efficiency for our customers.

Our portfolio includes solutions for website design and hosting, parks and recreation management, emergency and mass communications, agenda and meeting management, 311 and CRM, process automation and digital services, codification, licensing and permits, web governance and ADA remediation, social media archiving, and FOIA management.

EXPERIENCE

20+ Years

12,000+ Customers

900+ Employees

RECOGNITION

Inc. 5000 11-time Honoree

GovTech 2023 Top 100 Company

Stevie® Awards Recognized with multiple, global awards for sales and customer service excellence

Our commitment to deliver the right solutions in design and development, end-user satisfaction, and secure hosting has been instrumental in making us a leader in government web technology. We are proud to have earned the trust of our over 12,000 customers and their 100,000+ administrative users. In addition, over 340 million residents engage with our solutions daily.

Primary Office

302 S. 4th Street Suite 500
Manhattan, KS 66502
Toll Free: 888.228.2233 │ Fax: 785.587.8951
civicplus.com

Contact

Eric Petersen
Enterprise Account Manager
eric.petersen@civicplus.com
785.565.5326

Powering & Empowering Government

We empower municipal leaders to transform interactions between residents and government into consistently positive experiences that elevate resident satisfaction, increase revenue, and streamline operations.

Government leaders tell us that one of their most pressing needs is to improve how residents access and experience municipal services; however, they struggle with budget cutbacks and technology constraints. CivicPlus enables civic leaders to solve these problems, making consistently positive interactions between residents and government possible.

What sets us apart is our Civic Experience Platform. CivicPlus is the only government technology company exclusively committed to powering and empowering government to efficiently operate, serve, and govern using our innovative and integrated technology solutions built and supported by former municipal leaders and award-winning support teams. With it, municipalities increase revenue and operate more efficiently while fostering trust among residents.

Features & Functionality

The SeeClickFix 311 CRM is a proven leader of public service 311 request and work management software solutions. Through the use of web and mobile app services, we have helped millions of residents and hundreds of local governments build stronger communities. CivicPlus is committed to helping people and governments build more transparent, collaborative, and engaged communities.

Request & Work Order Management

IMPROVE STAFF EFFICIENCIES

- Easy-to-use mobile apps and website forms give residents a great experience allowing them to manage their request.
- Built-in duplicate detection saves you time and money.
- Geolocation detection from photos for increased location accuracy and ability to upload multiple photos.
- Automatic assignment workflows and due date escalation notification for quick documentation and resolution.
- Internal work orders created from service requests with related photos, locations, and details.
- Easily configure public and private settings for request categories and customizable questions.
- Easily log requests on behalf of residents with automatic updates sent.
- Support for marketing and rollout initiatives to ensure success at launch.
- Simple, clear report interfaces for quick access to data and core metrics.
- Recurring data exports tailored to your reporting requirements.
- Notification functionality for service request status.
- Mobile tools tailored to workers out in the field.
- Over 20 productized integrations and several API options.

OMNI-INBOX – UNIFY MULTI-CHANNEL COMMUNICATIONS

- Create a single interface for multi-channel correspondence (emails, calls, SMS, e.g.).
- Deploy a SMS text number for residents to message their local government.
- Utilize channels to organize communications by type, department, or person responsible.
- Set up automatic assignments and replies.
- Create templated responses for easier communications.
- Connects with the CivicPlus Chatbot (if purchased) for a seamless experience for residents and staff.

RESIDENT MANAGEMENT

- View a resident's profile with their history of interactions.
- Automatic creation of a resident profile.
- Tag profiles for grouping together (business owners, neighborhood watch groups, e.g.).
- Add notes to keep unique information to better personalize interactions with each resident.

ACCESSIBILITY COMPLIANCE

We continuously work to improve best practices and adherence to WCAG, iOS, and Android accessibility guidelines.

INTEGRATION CAPABILITIES

The SeeClickFix 311 CRM can be integrated with numerous other software programs through our connectors. This will allow the system to work with your existing software. Implementation and/or annual subscription fees may apply. Other integrations may be available. Please contact your sales representative for more details.

Current Integrations

- Accela Automation
- ArcGIS Online
- ArcGIS Workforce
- Bigbelly
- Brightly Asset Essentials
- Cartegraph Operations Management Software (OMS)
- Cityworks Asset Management Software (AMS)
- CivicPlus Code Enforcement, Permitting, and Licensing
- Infor Public Sector (IPS)
- Lagan (Verint CRM)
- Lucity

- Maximo
- Microsoft Dynamics
- Motorola PremierOne CSR
- NaviLine
- Oracle Service Cloud
- PubWorks
- TRAKiT
- Tyler Technologies Enterprise Permitting & Licensing Software (EnerGov)
- Tyler Technologies Enterprise Asset Management (EAM)
- VUEWorks

Mobile App

Every organization utilizing the SeeClickFix 311 CRM for request management can deploy branding for the SeeClickFix container application, which geolocates the user and shows the relevant organization(s) for the resident's location. The SeeClickFix mobile application has thousands of reviews with over a 4+ rating in both the Google Play and Apple stores. We update our apps, including Android and iOS, when new features become available or serious bugs have been identified.

- Geo-specific SeeClickFix app.
- Utilization of mobile buttons to display content like payment sites, phone numbers, social media, etc. This can enable Columbia to have an organization-wide mobile app for residents to connect with all aspects of your organization.
- Your internal staff can access most functionality to include due dates, assignments, and internal and public commentary for mobile management of requests.
- Allow for geographic-specific notifications via push to the app, email, and/or your web portal.

Conversations

MULTI-CHANNEL COMMUNICATION TOOL

Improve and Simplify Resident and Local Government Engagement

Today's local government resident relationship managers are faced with the challenge of managing and monitoring a fragmented and expanding number of resident communication channels.

With residents now using email, phone, text messaging, social media, chatbots, web forms, and traditional office drop-ins to ask questions, make requests, and share concerns, staff members are left struggling to respond to every inquiry and do it in a way that ensures the highest quality customer service experience.

We believe resident communication is a key part of a positive and frictionless civic experience for both residents and local government difference-makers. Conversations from the SeeClickFix 311 CRM is a multi-channel communication tool designed to improve and simplify resident and local government engagement. Inbound resident messages from email, text, in-person, and digital media channels are consolidated into a single interface for rapid outbound response. Resident communication histories are documented at the individual profile level to facilitate optimal service interactions. Flexible internal processes and tools can be configured to ensure better service and more efficient internal workflows.

Communication Aggregation

A single interface for all resident communications that allows you to intake and manage messages

Frictionless Interactions

Respond to each message with personalized comments to develop an engaging interaction with your residents

Flexible Internal Configurations

Organize and prioritize all communications and correspond internally with other members of your administration to ensure that the right information reaches the right person

Resident Records

Every inbound communication via email or SMS creates a resident record to track and manage all correspondence specific to each resident

Expedited Issue Resolution

Internal commenting functionality enables inter-departmental collaboration and supports accelerated issue resolution

Accountability Transparency

Track team member responsiveness, create KPIs, and monitor processes to hold teams accountable for providing high-quality resident service delivery

The Civic Experience Platform

Developed specifically to enable municipalities to deliver consistently positive interactions across every department and every service, the Civic Experience Platform includes technology innovations that deliver frictionless, one-stop, and personalized resident interactions. Local governments that leverage our Civic Experience Platform also benefit from:

- Single Sign-On (SSO) to all of your CivicPlus products supporting two-factor authentication and PCI Level password compatibility
- A single dashboard and toolbar for administrative access to your CivicPlus software stack
- Access to a continually growing and fully documented set of APIs to better connect your administration's processes and applications
- A centralized data store with robust data automation and integration capabilities

CIVICPLUS PORTAL

CivicPlus Portal strengthens your community's comprehensive resident relationship management capabilities. With a single username and password, residents can submit a public works request, ask a question, pay a utility bill, or register for an upcoming event. The result is more engaged and invested residents who are more likely to collaborate with you on the success of your community with fewer phone calls, walk-ins, or emails to your department asking how to submit a request or question.

INTEGRATION HUB

With Integration Hub's easy-to-use drag-and-drop interface, non-technical users can build integrations for syncing content and data between CivicPlus products or with third parties (for an additional fee) without the need for a developer. You can even easily create integrations using manual import, polling, and webhooks (for an additional cost).

For example, automatically create a request in the SeeClickFix 311 CRM with an IoT device.

The Integration Hub will reduce the amount of manual work your staff needs to do in the course of their daily work. This will save valuable time by automating your most time-consuming manual workflows.

Identity Provider (IdP) Integration

More often, local government IT teams are looking to implement single sign-on (SSO) functionality to simplify user access to all web and cloud-based applications without requiring individual authentication. The CivicPlus' Custom IdP Integration capabilities provide local governments with the following conveniences:

- Faster and easier access to vital third-party solutions that integrate with your CivicPlus unified applications, such as CivicEngage, CivicRec, and CivicPlus Agenda & Meeting Management Select
- Reduced password and account maintenance
- The ability to log into your CivicPlus software accounts from any device with an Active Directory username and password
- Auto-account generation
- Group syncing
- Customization of the design of your active directory login page

We offer integration with Microsoft's Azure Active Directory (AD), Microsoft's Active Directory Federation Services (AD FS) versions 3.0, 4.0, and 5.0, and Okta.

Implementation

Project Timeline

From project kickoff to announcing the launch of your SeeClickFix 311 CRM, the implementation process averages 8-12 weeks. For projects that include specific integration to an approved third-party system, the timeline generally expands to 12-18 weeks. Your staff will work with a CivicPlus implementation consultant to establish a workable schedule once final scope has been determined and your project kicks off. This overview provides you with an outline of what to expect during each phase.

PHASE 1: **INTRODUCTION & PLANNING**	• Introduction call • Final project timeline developed
PHASE 2: **ACCOUNT CONFIGURATION**	• Configuration of account and best practices • Identify branding standards for mobile app • One hour backend control training
PHASE 3: **USER TRAINING & TESTING**	• User training with customized agenda • User testing and revisions
PHASE 4: **MARKETING PLANNING**	• Launch and public announcement planning • Development of press release, social media campaign templates, and digital marketing images
PHASE 5: **LAUNCH**	• Assistance with launch press release • Press conference/council meeting assistance • Create theme campaigns for specific request types • Assistance developing messaging for PSA video or radio segment announcement

Approaching Your Project Implementation

Phase 1: Introduction & Planning

Implementation begins with an introduction call that includes your leadership team and implementation consultant. We will review your organization's goals, establish a timeline for launching your SeeClickFix 311 CRM, determine which departments will use the solution, and field any questions you have. During the introduction call, we will also determine if a kickoff presentation with your leadership team is needed.

After the introduction call, your implementation consultant will develop a final project timeline based on final scope, agreed milestones, and key deliverables.

Phase 2: Account Configuration

During this phase, your team will gain access to your SeeClickFix 311 CRM account and receive consultation on how to best configure your settings. This phase will also include a one-hour training session on the backend controls via webinar.

We will train you to configure your account for success. Configuration will include setting up members, request types, automatic assignments, and notifications, escalation contacts, timeline response goals, recurring data exports, preformatted response messages, custom emails, geographical areas for tracking and reporting, and mobile app buttons that link to webpages, call phone numbers, or display custom content.

Phase 3: User Training & Testing

Your training will include:

- How to effectively respond to service requests
- Understanding the differences between internal and external communications
- Process to generate work orders
- Creating usable reports
- Overview of new core concepts of application rules for request categories
- Secondary questions
- Workflows
- Request status alerts
- Notices
- User roles
- Access levels

We offer two approaches to training. Depending on the needs of your organization, training can be virtual for live groups or we can develop a train-the-trainer approach and work with two to three people on your team who will then train the remainder of your staff.

After training, authorized members can begin testing the platform to better understand the features and capabilities of the system. This testing also allows for feedback for configuration changes needed prior to launch.

See Click Fix offers two-three free monthly tutorials for customers to attend online at their convenience. We will review the topics you were previously trained on, and you can ask questions from our lead trainer. Many customers find these refresher tutorials extremely valuable as a review or even training of new staff members.

The goal of the SeeClickFix 311 CRM training is to educate system admins for the implementation process. If a custom agenda is required, we will work with Columbia stakeholders to develop the best training for your team.

Columbia's responsibilities will include:
- Securing stakeholder availability for meeting(s) to customize training agenda.
- Ensure admins are available to participate in the system admin training.
- Have team members available for the SeeClickFix 311 CRM install, provide training on best practices, and system configuration.

Phase 4: Marketing Planning

We will host a specific call to discuss launch and public announcement planning. We can provide a variety of resources to assist in marketing, including our User Adoption Guide and downloadable materials available from our Help Desk. The basic steps for marketing planning and launch include:
- Setting official launch and announcement date
- Completing a launch questionnaire
- Adding web portal and app links to your website
- Adding the app to Facebook page(s)
- Developing and executing marketing plan

Phase 5: Launch & Announcement

Your customer success manager will work with you to successfully announce the launch of the SeeClickFix 311 CRM in your community. This consulting and assistance may include:
- Assistance with crafting a press release
- Assistance with draft announcement language and design of organization newsletter, flyers, and other community-wide notices
- Assistance creating theme campaigns about specific request types (fall clean up, back to school, hurricane season preparation, etc.)
- Assistance with content/message of public service announcement video or radio segment

Continuing Services

Technical Support & Services

With technology, unlimited support is crucial. Our live technical support engineers based in North America are ready to answer your staff members' questions and ensure their confidence. CivicPlus' support team is available 9 a.m. – 6 p.m. (ET) to assist with any questions or concerns regarding the technical functionality and usage of your new solution.

CivicPlus Technical Support will provide a toll-free number as well as an online email support system for users to submit technical issues or questions. Emergency technical support is available 24/7 for designated, named points-of-contact, with members of CivicPlus' support teams available for urgent requests.

> ### Support at a Glance
>
> - Technical support engineers available 9 a.m. – 6 p.m. (ET) Monday – Friday (excluding holidays)
> - Accessible via phone and email
> - 4-hour response during normal hours
> - 24/7 emergency technical support for named points of contact
> - Dedicated customer success manager
> - Online self-service help with the CivicPlus Help Center (civicplus.help)

AWARD-WINNING

CivicPlus has been honored with two Gold Stevie® Awards, three Silver Stevie® Awards, and seven Bronze Stevie® Awards in the categories of Front-Line Customer Service Team of the Year – Technology Industries, Customer Service Training or Coaching Program of the Year – Technology Industries, Customer Service Department of the Year – Computer Software – Up to 1,000 Employees, Most Valuable Response by a Customer Service Team (COVID-19), Best Customer Satisfaction Strategy, and Remote Customer Service Innovation of the Year. The Stevie Awards are the world's top honors for customer service, contact center, business development, and sales professionals.

CIVICPLUS HELP CENTER

CivicPlus customers have 24/7 access to our online Help Center where users can review articles, user guides, FAQs, and can get tips on best practices. Our Help Center is continually monitored and updated by our dedicated Knowledge Management Team to ensure we are providing the information and resources you need to optimize your solution. In addition, the Help Center provides our release notes to keep your staff informed of upcoming enhancements and maintenance.

CONTINUING PARTNERSHIP

We won't disappear after your application is launched. You'll be assigned a dedicated customer success manager. They will partner with you by providing information on best practices and how to utilize the tools of your new system to most effectively engage your residents.

MAINTENANCE

- Extensive automated test suites integrated with version control system
- Web based products receive updates daily via a continuous integration process.
- Mobile apps are managed on a standard schedule for features (every 2-3 months) and as needed for bug fixes

Hosting & Security

The SeeClickFix 311 CRM's operational goal is 99.9% availability. All our systems are monitored continuously with automatic contact mechanisms and escalation to multiple members of our engineering team if a problem is detected. When problems occur, we use various methods to communicate status updates with partners.

Our services operate within the data centers of Linode and AWS, both of which employ numerous techniques to ensure reliable uptimes for our equipment and network access. When outages occur in these facilities, we do depend on our vendors to provide timely updates and resolution.

We have designed our services with redundancy and recovery procedures in mind to mitigate single points of failure. This includes redundant systems, the ability to provision new instances if necessary, and regular data backups. Databases are replicated in real time to a secondary server and backed up at a different data center every four hours for disaster recovery purposes.

Our software and operational configurations are managed in a version control system, and in a worst-case scenario we are able to re-deploy our services from the database backups and version control repositories.

DDOS MITIGATION

We have rate limits and filters in place for our public endpoints to discard most forms of abusive traffic. In a more severe situation, we would be able to migrate our services to alternate IP addresses or employ a commercial DDoS mitigation service to respond to a persistent attack.

SYSTEM SECURITY

- Our server software is updated regularly to minimize exposure to security problems.
- We monitor various security announcement lists in order to respond quickly to any vulnerabilities.
- Systems are accessible to engineers only on an as-needed basis.
- Our software is revision controlled and can be used to recreate our systems as needed for scaling, repairs, or disaster recovery.
- Our systems have restricted visibility to the Internet via firewall mechanisms.
- We support SSL encryption on all our services, including integrations with remote systems.

DATA CENTERS

Our data centers provider employ a variety of physical and system security practices. For more details on their security policies:

- Linode: linode.com/security
- AWS: aws.amazon.com/security
- Heroku: heroku.com/policy/security

Investment Proposal

CivicPlus can appreciate the monetary constraints facing our governments each day. To help ease these concerns and assist with budgeting and planning, our proposed project and pricing are valid for 60 days from June 12, 2023.

SeeClickFix 311 CRM Pro

- Unlimited User Licenses with Permissions and Roles
- iOS and Android Apps for Residents and Officials
- Embeddable Web Portal
- Request Workflows and Communication Tools
- Powerful Mapping & Analytics
- Alerts and Notices with Email and Push Notifications
- Work Orders with Tracked Resources
- Conversations
  - Manage all inbound and outbound correspondence with individual residents
  - Resident emails, texts, phone calls are aggregated and organized in a centralized hub
- Connector for EnerGov integration
- Connector for ArcGIS (1-way)
- SSO with a Custom IdP
- See ClickFix Organization API

Professional Services

- SeeClickFix 311 CRM Account Configuration
- SeeClickFix 311 CRM Virtual Training

Annual Recurring Services

- Hosting and Security
- Software maintenance including service patches and system enhancements
- 24/7 technical support and access to the CivicPlus Help Center
- Dedicated customer success manager

Columbia's Investment	
Year 1 List Price	~~$72,397.20~~
Year 1 Total Discount	($33,633.05)
Total Year 1 Investment (includes one-time fees and Year 1 annual services)	$38,764.15
Year 2 (includes 3% uplift)	$52,720.96

CivicPlus Project Pricing & Invoicing

CivicPlus prices on a per-project, all-inclusive basis (stated in U.S. dollars). This type of pricing structure eliminates surprise costs, the uncertainty of paying by the hour, and is overall more cost effective for our customers. It provides you with a price based on the products and features listed in this proposal that only varies if additional functionality, custom development, security, escrow requirements, or other design or project enhancements, outside of the included scope, are added prior to contract signing.

CIVICPLUS OFFERS:

Standard Invoicing

- 50% of Year 1 fees due at contract signing; remaining 50% due at the earlier of project completion or at the six-month mark in the implementation process
- First-year Annual Services fee is included with your Year 1 cost
- Subsequent annual invoicing occurs on the anniversary of the contract signing date, and is subject to a three percent technology fee uplift each year starting Year 2 of your contract

Customized Billing/Invoicing

- Other billing options can be discussed before contract signing and, if feasible, a plan developed that works for all parties
- Not available with all CivicPlus products—please contact your customer success manager for more details

We will work with you before contract signing to determine which of our billing processes will meet both your needs for budget planning and our accounting processes.

Proposal as Non-Binding Document

A successful project begins with a contract that meets the needs of both parties. This proposal is intended as a non-binding document, and the contents hereof may be superseded by an agreement for services. Its purpose is to provide information on a proposed project we believe will meet your needs based on the information available. If awarded the project, CivicPlus reserves the right to negotiate the contractual terms, obligations, covenants, and insurance requirements before a final agreement is reached. We look forward to developing a mutually beneficial contract with Columbia.