Enterprise Citizen Request Management

Presented by QScend Technologies, Inc.

Subject: Executive Summary

Dear City of Salinas,

The entire team at QScend Technologies is very excited about the possibility of partnering with City of Salinas on this important citizen service initiative. With a history of 100% success in all of our implementations, we are fully prepared to perform the task of deploying the City's new CRM software.

Over 200 cities and counties use QAlert to improve citizen service, manage requests, and increase performance measurement. Local government organizations are using QAlert's powerful functionality to:

- Streamline business processes and communications with internal and external customers
- Create the most effective and efficient government through integration with 3rd party applications and social media
- Enhance citizen self-serve experiences with QAlert's web service center and mobile app

Among the many reasons why QAlert is a recognized CRM success story:

- QAlert is licensed **for unlimited users,** so there are no limitations for a large-scale deployment either now or in the future.

- QAlert is one of the only municipal CRM systems available which offers the option of a mobile management app. Using QAlert Mobile, employees can reduce inefficiencies and improve workflows in the field using an iPad.

- QScend will build a Salinas-specific branded citizen mobile application for iPhone and Android. Your citizens will be able to submit service requests, view news, check request status and more, directly from the Salinas application.

We are looking forward to the possibility of partnering with the City of Salinas on this exciting initiative. Please do not hesitate to contact us with any questions you may have.

Sincerely,

Jessica Chase
Vice President of Sales

Keith LeBeau
Authorized Representative

FIRM OVERVIEW

QScend Technologies, Inc. is an industry leader in Citizen Request Management software development and project deployments. Our primary focus is local and county government all of our products and features are specifically designed to improve workflows and streamline internal government processes while improving citizen service and engagement. Utilized in towns as small in population size as 1,700 and in cities as large as 900k, our product suite will meet the needs of any size municipality.

Our staff is available for after-hours telephone support 24 hours a day, 7 days a week.

QScend Technologies has been in the e-government software business since 1998 and is a privately held company. We are committed to providing cutting-edge software solutions and embracing the latest technology.

Below, you will find information regarding the key QScend staff members that will be your contacts during implementation and throughout your continued partnership with QScend.

Qualifications and Experience - **Staff**

Jessica Chase | QAlert Account Executive | Sales & Marketing

Resume
• 11 years VP of Sales experience in hardware & software for governments
• 16 years of experience in marketing communications
• 16 years of experience in customer management and account building

With my extensive experience in 311/CRM development initiatives, I apply the necessary knowledge to balance the requirements for functionality, quality, economy and timeliness. Successful completion of projects and tasks before deadlines is what I strive for, while maintaining consistency and professionalism. Diplomatic and tactful with professionals and non-professionals at all levels, I am flexible and versatile and able to maintain a sense of humor under pressure.

Mike LeBeau | QAlert Project Manager | Design & Development

Education
Bachelor's degree in Business Management
Resume
• 7 years project management experience
• Adobe Suite CS6 proficient with years of coding experience

With working knowledge of our CRM software, I maintain proactive communication between parties, assembling and coordinating all implementation in the QAlert project timeline. Experienced with government software initiatives, I also have an in-depth knowledge of e-government best practices.

Nana Poku | App and Web Designer | Design & Development

Education
Master's degree in Graphic Design
Resume
• 13 years of commercial web & print design experience
• University Professor teaching Graphic Design
• Adobe Suite proficient with years of hand coding experience

Day in and day out, when I'm not teaching design and implementation, I'm building apps and websites for new and existing customers using points made during meetings, my keen eye for design and my extensive coding experience, with analytics, SEO & responsiveness in mind.

Travis Lent | Software Development Team Leader | Design & Development

Education
Certified in Windows operating systems and Web server environments
Resume
• 17 years industry experience in client-server application
• Programming Team leader

The team leader of the Programming department, I am responsible for all programming projects, bug fixes, and applications.

Kristee Trelli | Marketing Specialist & Coordinator | Sales & Marketing

Education
Bachelor's degree in Marketing and Communications
Resume
• 5 years of government marketing experience

Helping cities and counties with their citizen outreach is only a small portion of the service I provide. Email Marketing, Social Media Marketing, Online Advertising, Print Marketing, Web Analytics, SEM, Marketing Strategy, SEO understanding and Customer Service tie together a better understanding of the breadth of my work.

Ed Dzitko | Director of QScend Academy | Training & Education

Education
Bachelor's degree in Communication (Public Relations and Advertising)
Resume
• 10 years in journalism and public relations
• 15 years of teaching, training, and public speaking

Aside from creating online training videos, monthly webinars, and documentation-like style guides and Q&As for classroom training materials, I coordinate and conduct QScend's training classes. As a part of QScend Academy, tutoring/instructing people of any profession and skill level comes from my deep understanding and knowledge of all Q-products.

Austin Murkland | Senior Network and Systems Administrator | Design & Development

Education
Bachelor's degree in Computer Science
Resume
• 13 years of computer networking experience
• 7 years at QScend as a Senior Administrator

A self-starter with many years of local and remote infrastructure analysis and design, virtualization migration, and maintenance experience, I'm also well versed on iOS Application Development and Design. In addition, I oversee and implement all QScend IT projects and IT helpdesk.

Paul Bentley | Senior Technical Support Manager | IT & Customer Support

Education
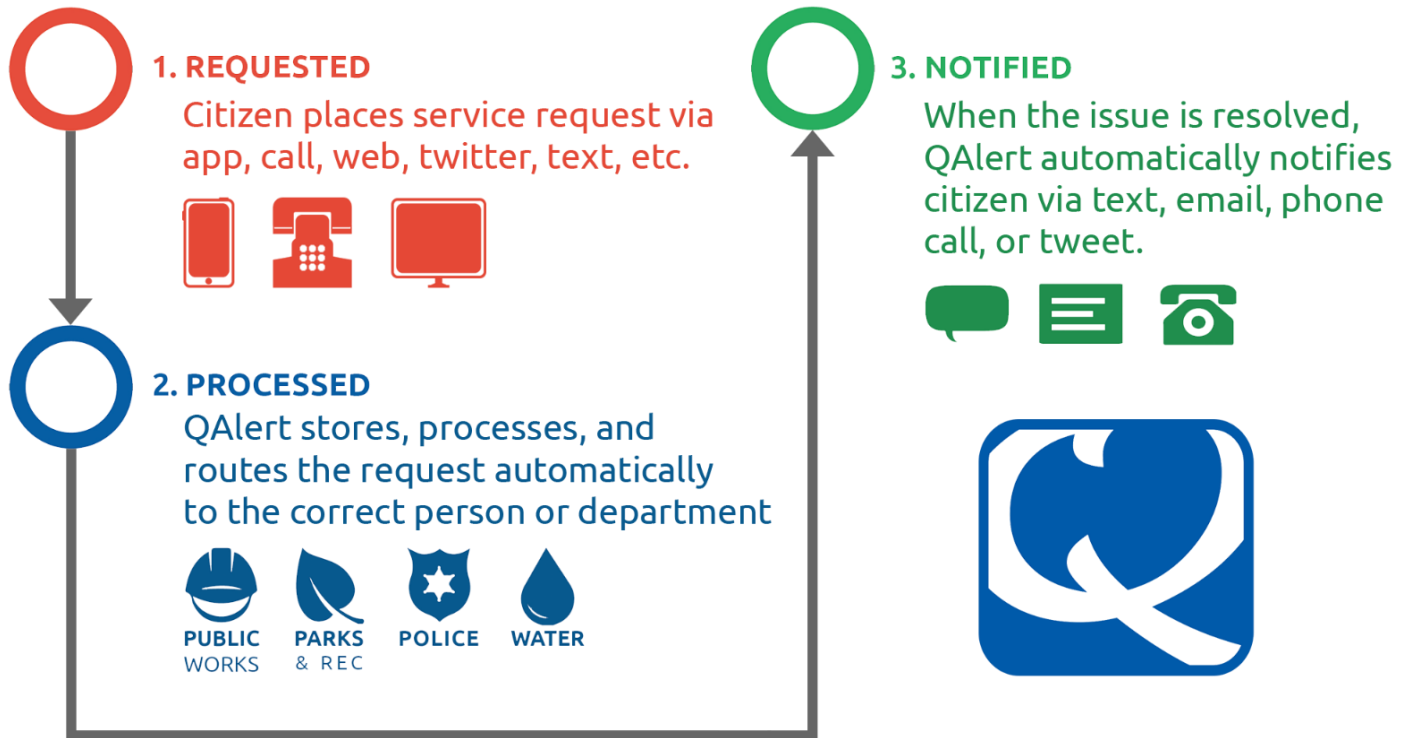Bachelor's degree in CIS (Computer Information Systems)
Resume
• 9 years in IT & Customer Support for QScend
• 5 years of User Interface Design, Website Development & Planning

In order to provide you the best possible support, my background is decorated with everything I would need to know to tackle any situation from a Support and IT standpoint. JavaScript, VB.NET, Web Development, CMS, Program Management, CSS, HTML 5, Project Management, Strategic Google Analytics with a deep understanding and knowledge of all Q-products are the main points of my experience.

System Overview

The following pages will demonstrate the features and functionality of QAlert. We are confident that all functional requirements stated in the RFP will be met.   We will begin with the infographic below, which gives you a visual overview of the workflow process of QAlert.
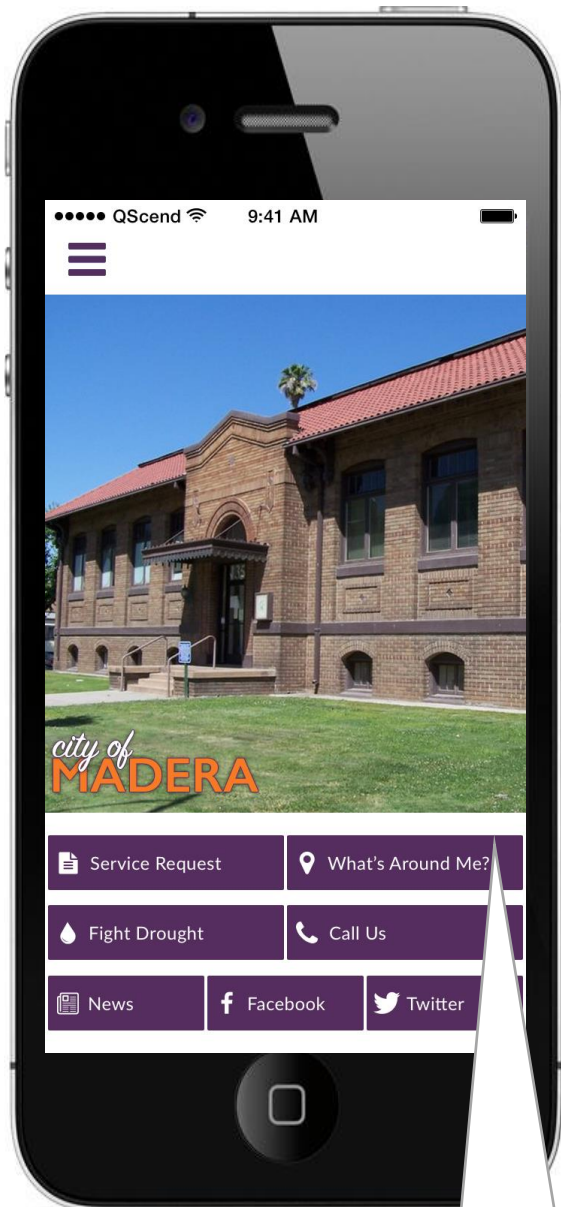
1. REQUESTED
Citizen places service request via app, call, web, twitter, text, etc.

3. NOTIFIED
When the issue is resolved, QAlert automatically notifies citizen via text, email, phone call, or tweet.

2. PROCESSED
QAlert stores, processes, and routes the request automatically to the correct person or department

PUBLIC WORKS   PARKS & REC   POLICE   WATER

George Ertle,
Clayton, Missouri

"QAlert has an intuitive design that is simple to use for both residents and staff. I continue to be amazed by the level of support provided by the team. From selection to post-implementation, customer service provided by QScend has been unparalleled."

System Overview - **Citizen Self-Serve - City Branded App**

With your City App, citizens can quickly access information and report an issue directly from their mobile phones. Our mobile apps are very customizable and the widget options are endless.

QAlert also offers the capability of adding a sub-app. Sub-apps are a great way to promote specific initiatives or something that is going on in the City.

Main app featuring a photo gallery on top and the main widgets

Sub-app featuring drought related information and service types

System Overview - - **Citizen Self-Serve - Your New Virtual Citizen Service Center**

Styled by our designers to match your existing website and branding, your new Virtual Citizen Service Center will be a one - stop shop for your citizens to self-help from the web. It is placed right within your website and may include a knowledge base (FAQs), a request intake form, an app download link, and any other contact information you would like.

Example: Lacey Township, New Jersey

Features may include:

- Citizen account creation
- Citizen can choose contact preferences (email, call, text, letter)
- City Twitter feed
- Custom styling to match City branding

System Overview - - Citizen Self-Serve - Website Knowledge Base

Your Knowledge Base will be an ever-growing centralized repository of information. You have the option to tag popular articles and feature recently updated articles.

Example: City of Warren, Michigan

Features include:

- Articles searchable by keyword
- Articles searched by category
- Popular articles can be pinned on the back end
- System automatically adds recently updated articles

System Overview - **Citizen Self-Serve - Website Request Form**

Citizens can request services or report issues directly on your website, powered by QAlert. They can create an account or you can allow them to submit anonymously. If you choose to let them create an account, they can log in and see the status of previously submitted requests.

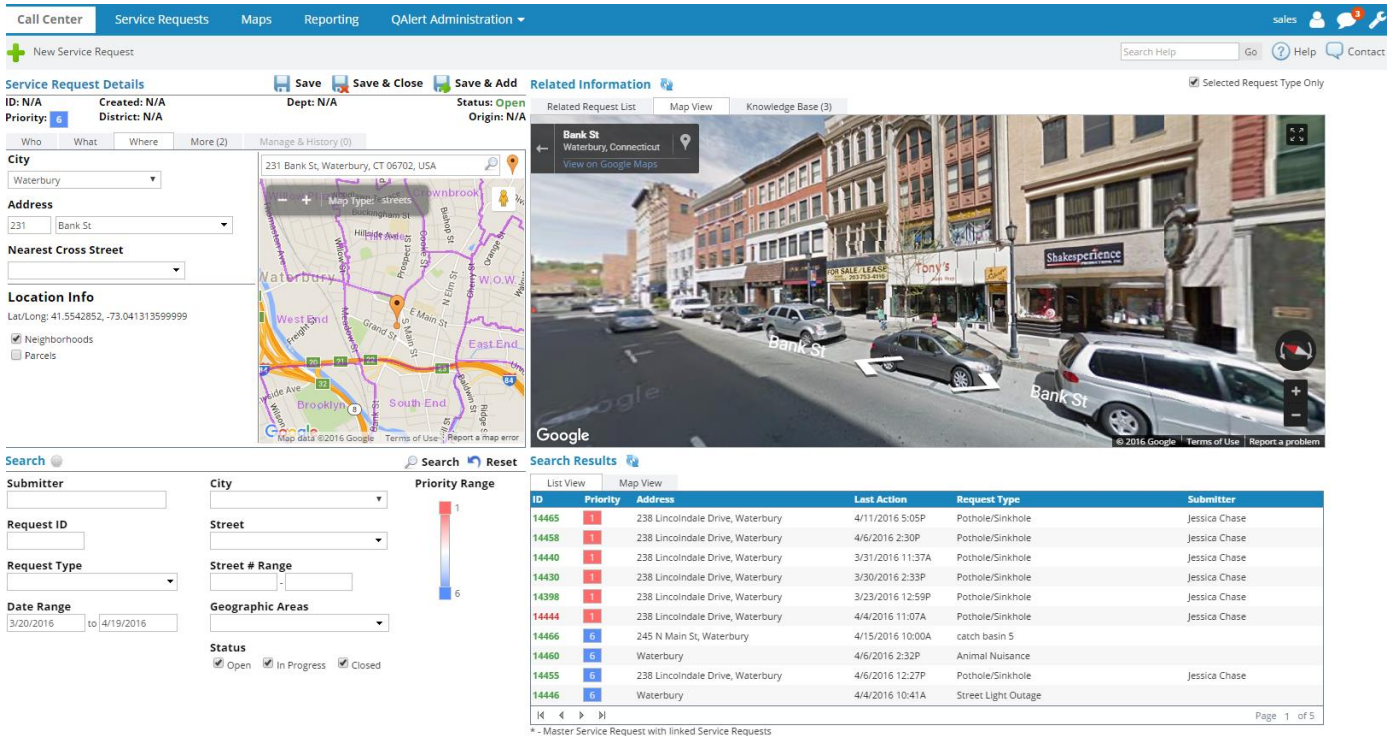**Example: Fort Lauderdale, Florida**

Features include:

- Google map base with street view
- City-specified required information, based on what is being reported
- Multiple files and/or images uploader
- Automatic service level expectation responses to citizen once report is issued

System Overview - - Internal City Staff Tools - Entering a call internally
Accessible only to City Staff with permissions

Citizens are calling for one of three reasons: To report something new, to check on something already reported or to ask a question. From the QAlert "Call Center" view every one of those calls can be helped, from one screen.

Features include:

- Enter a new call in seconds
- Street view of issue location
- Search for a request already in the system
- View a live feed of requests coming in
- Access Internal knowledge base
- View Map with GIS layer overlay
- Change priority level
- View predefined questions based on issue type
- Reusable comments for quick comment entry
- Inbound Twitter, text and email requests
- Auto-detect duplicate records

System Overview - - **Internal City Staff Tools – Viewing and Updating Service Requests**

This is where internal staff will manage and act on service requests that are assigned to them. Logging in, they will only see requests that they are directly responsible for. Below is an example of a list of service requests. <mark>To the right you see incoming tweets, emails and text messages.</mark>

Features include

- Add activity to the service request record
- Re-route service requests to someone else or another department
- Link duplicate requests together
- View full history log
- Re-open service requests that were closed if applicable
- Create and save custom dashboards
- Advanced search by keyword
- Map view of all service requests assigned to you
- Change priority level of service request
- Update additional information fields if applicable
- Auto-notify citizen: Robo call, tweet, text or email
- Print or export the entire service request record
- Access knowledge base
- Mass update or update service requests on an individual basis

System Overview - - **Internal City Staff Tools – Reporting Tab**

Among the strongest features in QAlert is the high-powered report writer which enables users to customize their reports by tailoring the system's existing reports, or by starting from scratch. The resulting reports can be shared among users within your department or shared with users elsewhere.

Features include

- Custom report writer
- Shared reports
- Standard reports
- Automatically scheduled reports
- Downloadable in multiple formats
- Email reports directly
- Built-in security
- Custom dashboard for each user

System Overview - - **Additional Features Included with QAlert**

General

- Multi-channel request submission: by phone, the web, text, tweet, email
- Self-service options with web request submission
- APIs support real-time, bi-directional integration with government business applications; GIS, Work Order, Animal Services, Permits and Inspection, Code Enforcement

Call Entry

- Customize criteria for duplicate detection using time, case type, and geographic parameters
- Address validation eliminates dispatching field staff to the wrong location
- Smart scripts and forms assist customer service agents to record pertinent information
- Search for cases by caller, location, case type, geographic region
- Log calls for information

Service Request Management

- Geographic-based request assignment
- Map views and map assist location setting
- Flexible workflows route service requests to the correct department
- Geographic routing
- Automatic escalation settings notify management of delays or similar cases
- Many types of user-defined fields: option lists, checkboxes, radio buttons, text fields
- Case inbox provides quick access to assigned requests or requests assigned to staff
- Record and log case activity with public and private security options
- Ability to change priority on a service request type

Reporting

- Management Dashboard provides rich graphical views on request types, close rates, status and more
- Customer and operational metric reporting
- Customizable reports that can be viewed by all users
- Map reports for visualization, trend analysis and performance management
- Measure results and identify trends like recurring requests, problem areas, call volume, and satisfaction
- Consistent and accurate information and answers
- Touch-tone phone request status using integrated voice response
- Granular role-based security
- Real-time knowledge filtering and delivery
- Heat maps

System Overview - - **Internal City Staff Tools – QAlert Mobile Management Application**
(Optional iPad application for responders in the field)

Better than just mobile friendly because our app is functional if you don't have a connection to cellular data. QAlert Mobile (iPad app) allows your employees in the field to view requests in real time, enter comments that can be sent directly to the citizen, and close service requests as soon as they are completed. This greatly reduces paperwork while saving time.

Implementation - Getting Started with QScend - Project Management Services

Each new QScend partner works very closely with the QScend team from introduction to full launch. This entire process takes approximately 6-8 weeks. This document describes in detail the Phases of the implementation process.
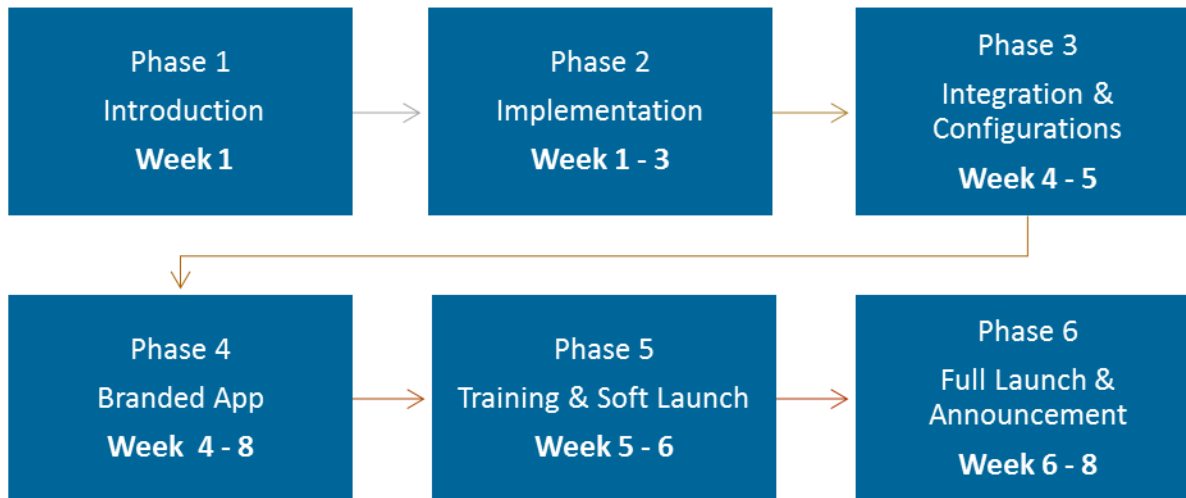

Phase 1: Introduction

After signing the contract, a call is scheduled to establish the project timeline, schedule your on-site kick-off meeting and arrange your initial webinar training session. Below are the details of the goals of each of those events.

Meet Your Project Management Team! – This is the first call you will have with your project managers from QScend. The discussion will involve all project leads on your end. Your project managers from QScend will go over the phases of this project and the requirements needed in order to get QAlert up and running. Any outside integrations will be discussed during this time. While this is being discussed a timeline will be built out based upon your full launch date.

Onsite Kick off Meeting – During this kick-off meeting, your project managers from QScend present QAlert to your department heads showing the benefits they can expect once implemented. Your project managers will answer any questions your departments may have during this time. Following the presentation, the QScend team will meet with additional departments to discuss their involvement.

Administrator Training – Our Educational Department will conduct this first webinar (Administrator Training) which is directed towards power users of QAlert. These will be users who will be making additions, changes, or overlooking QAlert. During this webinar, you will get a much better understanding of how the requirements needed for implementation will drive the performance of QAlert. You will be provided with an in-depth view of how QAlert works. The Educational Department will give many examples and answer any questions you may have during this call. This webinar is followed by additional webinars as the project moves along.

Phase 2: Implementation

During your introductory call with your project managers from QScend, you will be provided a list of the requirements needed for implementation. They will work with you and other departments to gather this data. A call will be setup between your IT and GIS departments to discuss additional data the QScend team will need. The minimal data needed for implementation will be:

- **Municipal Streets Database** - A list of street names within your municipality.
- **Citizen Record Database** – Names and addresses of citizens within your municipality. Voter's registration data is recommended.
- **Users List** – A list of users who will be using QAlert. This will be anyone receiving notifications or entering calls into QAlert. Their email addresses will need to be provided.
- **List of Departments** – A full list of departments at your municipality. QAlert can report on Service Request Types and the responsible department.
- **Service Request Types** – Service requests are requests for help; service request types are the reasons that help is necessary. They also are key items for which an organization needs data to report on to enhance services and performance.
- **Routes** – Routes are the departmental experts - individuals or groups - responsible for resolving service requests.
- **Escalation Routes** – Additional routes that will be notified if the request hasn't been taken care of during a certain time period. You will decide on this time frame and who will be notified.
- **GIS Layers** – Your Project Managers from QScend will work with your GIS departments on the integration of GIS layers.

Product Enhancements

- **Knowledge Base Articles -** A knowledge base is a centralized repository for information, a database of related information about a particular subject. Similar to Frequently Asked Questions, this will be built out to related Service Request Types.
- **Prompts & Scripts –** Information that is related to a request type that may provide you with information to give out to a submitter or with questions to help you collect information.
- **Notification Content** - This is information about request resolution expectations, for example, that an organization can "push" to submitters. It is delivered in the initial receipt email when notifications are enabled.
- **Custom Fields** - A field type that you can create to collect data that QAlert doesn't.
- **Reusable Comments** - Information snippets that you may use over and over again. You can add your own or use a global comment that has been added for everyone's use.
- **Schedule Reports** – Reports can be custom built and delivered at your schedule.
- **"Places" Lookup -** A place is a landmark, place, or building that is more known by name than address. Rather than searching for an address, citizens can search by Places when entering the location of a request.

Phase 3: Integration & Configurations

With integrations discussed earlier in the project, QScend will work with you and your third-party vendor to build out this integration. A sandbox environment will be created to build and test this data within QAlert. During this phase QScend will also work with you on configurations within QAlert. These configurations will include;
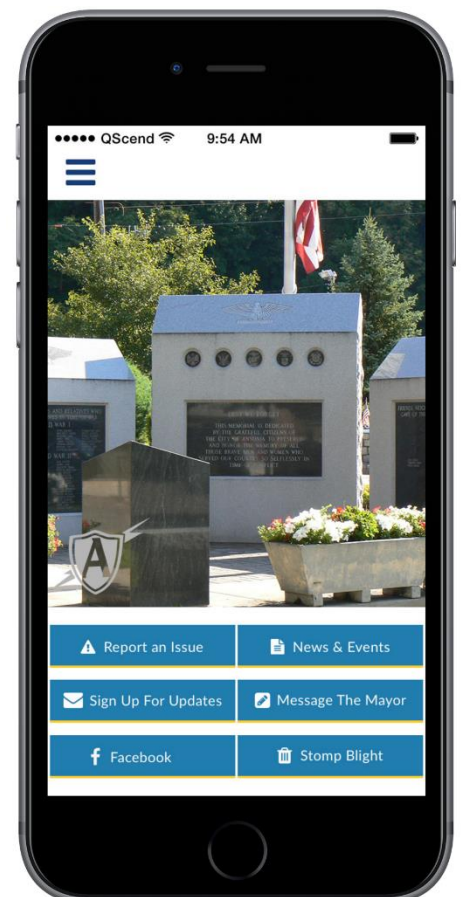
- **Setting up QAlert Email Address**
- **Build Email Templates** – By default QAlert will provide canned email templates. You will have the option to build these out and brand them to best fit your municipality.
- **Enable Auto-call/SMS** – Setting up QAlert with phone numbers for auto-call back and text messaging.
- **Develop a Call Script** – With auto-call turned on you will develop text associated with your municipality.
- **Configure Calendar on Escalations** – Setup calendar to eliminate escalation count on weekends or during holidays.
- **Add Twitter Intake** – Create and add a twitter handle to QAlert as another way to intake Service Requests.

Phase 4: Branded App

Your branded app integrates with your installation of QAlert to allow your citizens to submit requests for service from their smart phone or tablet and show you the problem by sending a photo of the issue. This is key element, but you don't have to stop there. There's really no limit to what you can incorporate into your app. You will work with the QScend team on deciding which additional app elements work best for your municipality. The Web Design team from QScend will work closely with you building out the following:

- **App Name** - Try to relate your title to your organization or your project with a name that promotes your 311 center, if applicable, or some interaction between you and your citizens.
- **Splash Screen Image** - The first screen image of your app that users see as it loads, opens and takes you to the home screen.
- **Slideshow Images** – Images that can be changed on demand that show off your municipality.
- **Icon** - Essentially your app logo.
- **Buttons or App Elements** – Aside from submitting a request, what else would you like the app to do for your citizens.

Building out the branded app typically takes 4-6 weeks from start to publish. This can begin during the early phases of the QAlert Project.

Phase 5: Training & Soft Launch

Training dates will be setup for you and your staff planning to use QAlert. This can include onsite training or online webinars from our Educational Department. You and your staff will have full access to QScend Academy which offers several learning opportunities. The Academy offers online training courses consisting of videos and live online webinars. During this phase, you and your team will:

QScend Academy is a world of information that's accessible in so many ways. The mission of QScend Academy is to service all levels of QScend educational needs within your organization. The programs are designed to train anyone — frontline staff, managers, administrators, and IT staff — increasing your organization productivity from top to bottom.

- *On-Site Private Learning Session* is a premium education solution for municipalities that wish to offer hands-on session(s) for staff. A QScend Academy education specialist will design a custom single or multi-day course for your organization with training manuals, and then visit your location to guide the training in-person.

- *Academy Private Learning Session* *(visit us)* allows in-state municipal staff to visit our training facility for lunch and premium, in-person, hands-on training session(s). A QScend Academy education specialist will design a custom single or multi-day course for your organization, and provide training manuals to assist the guided training.

- *Online QScend Academy* is an interactive, self-guided study with videos, exercises, and tests designed to rapidly develop the skills required to excel with the QScend suite of products.
    - Watch — Flash movies that describe on-screen actions
    - Listen — Instructor-led audio narration guides trainees along
    - Interact — Practice actual procedures with mouse clicks and interactive quizzes
    - Learn — Right from your desk with no travel required

- *Distance Learning* is designed for staffers who would like to earn special certification, which may count toward CEU credit in their professional organization.

- *Annual User Group* is a gathering of municipal professionals and provides a unique opportunity for the exchange of ideas on using technology to improve citizen service.

Phase 6: Full Launch & Announcement

Congratulations! At this final stage, you will begin the rollout and announcement of QAlert to the public! QScend's marketing team will be in touch during this time to discuss and develop ways to market QAlert and your branded mobile app to your community. This exciting phase will include:

- **QAlert Webform** – Introducing the QAlert webform onto your municipal website. You will work with the QScend team to decide on which elements you want to include or make a requirement on the webform. The webform is responsive and will be styled to match your website.

- **Marketing** – Marketing is at the core of every successful business, but just because the format has changed, it doesn't mean you should be left out in the cold using antiquated methods. Over the years, we have also noticed that though the opportunity to "get the word out" is there, it's rarely utilized by municipalities during, and after, the build process. At QScend, we understand that you have enough on your plate, as it is, and adding marketing to your plate is just a nice thought that may never be realized. The success of this project is just as important to us as it is to you. This is why we also invest in a marketing specialist to ensure that citizens know about the launch and begin using your app, website app and all of the self-serve options you enable.

    Social Media Posts after launch — following many tests and tweaks until satisfied, we will "go live" and spread the news on social media.

    Social Media Assistance — if you are not familiar with social media, how to get started or are just looking for some tips we are here to support you. Email/call marketing support at any time, your success is our success.

    Marketing Portal — customers have full access to our marketing portal for a variety of press release samples, ideas and tips to help you spread the word about your app and solution.

    Analytics Analysis in three months — we will have the data needed for further improvement of your citizen reach. Our specialist will view this data by going over its individual parts to better understand how to go forward.

    Follow-up Interview after six months — of successful campaigning our marketing specialist will contact you for a follow-up interview for media coverage.

After the Full Launch has been deployed the QScend team will regularly be in touch to setup reviews. During this time, you will discuss improvements and exciting new updates with the QScend team!

Ongoing Partnership Services - Customer Support

We ensure that our customers are taken care of!   Contact us any way you feel comfortable phone, fax, and email or through our support portal! Our support is truly unmatched, a few things that help us stand out:

Not only can you call us and speak with a live person at our office, but you can live chat with us too! Our support department offers any and every contact option you may need! We also provide support around-the-clock:
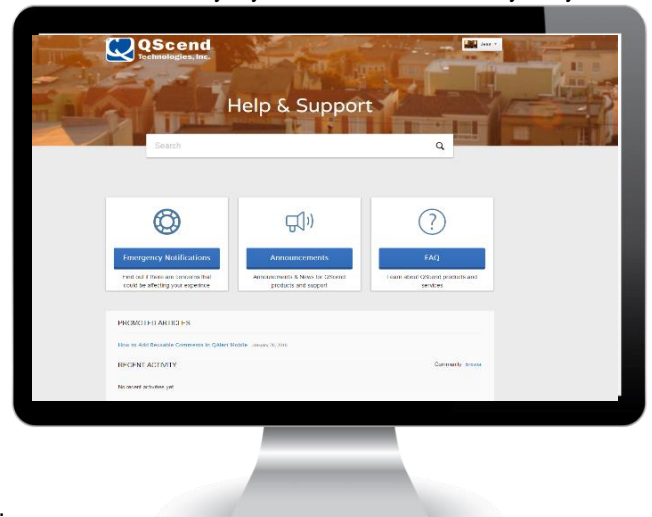
- Live Support; not automated: 8am-6pm (EST) Monday-Friday (excluding holidays)
- Emergency Support (Engineers are on call, after hours: 203-757-6000)
- Support Portal (FAQs, tips, news, etc.) and Email Support ()
- Dedicated In-House Support Personnel, Dedicated Training Support, and Consulting

Ongoing Partnership Services - Maintenance

We listen to our customers: Our product is built on customer feedback. Our customers are the everyday users of QAlert, so really, they are the experts.   New features and functions that we deploy are often at the request of our customers.

We want to build lasting partnerships. Our development approach ensures that what meets your needs today will meet your needs in the future. We never charge upgrade fees, so as long as you are an existing customer you will have the latest and greatest. A few things that stand out about our maintenance:

- We deploy 1-2 major releases a year with new features and functionality.

- We are one of the only companies that offer our API to our customers at NO ADDITIONAL FEE, for 3rd party integrations.

- All QScend software is developed and supported in the United States.

- Every new release is followed by training videos and documentation and implementation support.

We continually enhance our products and protect against XSS and CSRF attacks as part of our validation and QA testing process. As industry trends and technology change, so will your software. Your maintenance package includes:

- Software Updates
- Integration with Popular 3rd-Party Vendors
- Bug Testing
- New Development
- Installation of Service Patches, etc.

Security Notes: Internet Service Provider (Datacenter Cervalis/CyrusOne Peering with Internap and Lightpath) | Spam Firewalls | Multiple HP G7 Servers connected to HP LeftHand and RightHand SAN's & purpose-built appliances for firewall/IPS/ids and spam filters for email customers. Each HP server is running VMware with approximately ~6 guest VM's running server 2008. The HP G7 servers are part of the data center's managed environment in VPC configuration exclusively for QScend.

Ongoing Partnership Services - Hosting

Our hosting facilities are located in secure locations and are monitored 24/7 with a state-of-the-art Intrusion Detection System (DS) and Sensor Security System. We use multiple vendor backbones to ensure data reaches the end-user in the fastest, most efficient manner possible. Our hosting facilities are engineered to avoid any single point of failure in our connectivity, power or HVAC.

- No limit to the amount of bandwidth/space needed for archiving, etc.
- Secure portal, post mortem reporting & investigation
- Disaster recovery; a data storage solution with redundancy
- Always on (no "off" toggle) mitigation service (blocks DDoS attacks) monitoring all traffic/IP addresses | DDoS: Distributed Denial of Service; multiple systems targeting a single system

Customer References

Steve Craig
City of Somerville, Massachusetts – SCraig@somervillema.gov – 617-625-6600 x2150

Wendy Urbanic – 311 Response Center
City of Pittsburgh, Pennsylvania – wendy.urbanic@pittsburghpa.gov – 412-255-4784

Rogena Bonner – 311 Call Center Manger
City of Tuscaloosa, Alabama – rbonner@tuscaloosa.com – 205-523-2730

Dawn Danen – Call Center
City of Reno, Nevada – danend@reno.gov – 775-334-4273