

Constituent Management System

The Information Strategies (Infostrat) Constituent Management System helps elected officials and their staff to respond more effectively to requests from constituents. The solution uses the Microsoft CRM platform, which provides scalability and flexibility.

BACKGROUND

County Commissioners and other elected officials need to track all interactions with constituents, including emails, correspondence, phone calls and in-person meetings. Most elected officials rely on manual systems and processes that do not support multiple users or allow automated workflows to ensure that requests are fulfilled.

FEATURES

Infostrat developed a constituent management solution that enables the tracking and management of all contact activities for the commissioner's staff and the commissioner.

Workflow capability allows users to assign tasks and track completion. It provides email notification when workflow steps are completed, as well as reports and reminders when necessary.

Infostrat created a workflow generating utility to configure workflow steps based on a spreadsheet. This spreadsheet defines what additional tasks are to be created as a task is completed. When one task is completed, the next group of tasks is automatically started and assigned. This program can be re-run at any time when workflows need to be changed.

Other key system features include:

- Constituent case tracking
- Communication tracking
- Emails and document tracking
- Standard mail and email templates for common requests
- Ability to assign and reassign cases to case workers
- Export capability to Excel and Word
- Flexible workflows to allow easy changes as procedures are modified

Solution at a glance

Constituent Management for Local Government

Technologies Involved

Microsoft Dynamics CRM, SQL Server 2005, SQL Reporting Services, Microsoft Office.

- Ability to redefine workflow processes using configuration file, without coding
- Advanced security, with record level permissions
- Support for multiple clients, including mobile devices
- Data import tool

INTEGRATION

Because Microsoft CRM offers an Outlook interface, the learning curve for users is significantly reduced. From tracking all constituent requests and paperwork status to automating the constituent management document intensive process, many features are built into the Constituent Management System to simplify activities associated with case workflow. These integration features include:

- Outlook Integration - The Constituent Management workplace is fully integrated with Microsoft Outlook which allows e-mail to be stored with subject and contact information, as well as synchronization of tasks and calendars.
- Email notification – New cases and case progress generate email notification to users. Outlook emails may be tracked in Constituent Management from Outlook.
- Everything in One Location - Multiple departments and users can now access all the current information on each client, eliminating having to look in various locations and ensure that all items are documented.
- Automated Workflows - Users can go into tasks and select any of the workflows that are out there and they will automatically run the next steps when the current steps are completed.
- Offline use – Records may be taken offline and synchronized when users reconnect to the network.
- Auditing – Auditing allows managers to have insight into when information was changed, what that information was, and who changed it. The audit system allows configuration and tracking of changes to all data elements.

Infostrat's Constituent Management Solution allows local governments to respond more effectively to requests from constituents.