City of Maricopa

Legislation Text

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The Mayor and City Council shall discuss and possibly take action on a budget transfer to purchase Microsoft Dynamics as the departments customer relationship management (CRM) system. The request for a budgetary transfer in the amount of $8,375 Economic Development - Advertising (10011616-55540) to Economic Development - Technical (10011616-53340). **Discussion and Action.**

The Mayor and City Council will hear a request to transfer funds for the purchase of Microsoft Dynamics a CRM.

The Economic Development Department has been exploring available options for updating the current Content Relationship Management (CRM) system. CRM systems act as a centralized repository for leads, campaign information, program initiatives and more. Below are some examples as to how the program typically works.

1. Sales Mission - The Department would enter each meeting held, topics discussed, course of action or follow up items. All information is not only held in the CRM but it will also keep a log of necessary action items and reminders.

2. Business Retention & Expansion Program - The Department would be able to store meeting findings in the CRM, all information is accessible to all members of the department, and the program would create a log of action items.

3. Project Leads - The Department would enter any all leads sourced by our Department, ACA, GPEC, Sun Corridor or other. The CRM would allow us to enter data on each lead, which site was chosen and notes as to why Maricopa was or was not chosen.

4. Projects Details - The Department would be able to enter specific information to a project for example Edison Pointe, Apex, The Wells.

5. Developer Contacts - Each member of the Department should be able to enter any contact information as well as action items such: email introduction, send marketing materials, share Why Maricopa video, etc.

We currently utilize Salesforce as the CRM system for the Department. The current version of the CRM is discontinued and no longer serviced by Conrin our Consultant. Therefore, the current version of Salesforce is not cable of providing several of the features listed above nor does it offer any automated features. The cost to update the current system is $7500 and then offer ten hour blocks for ongoing support for $1500.

Today, we have limited ability to store information and follow up with contacts in the current

system. The ultimate goal is to create streamline communication with contacts, leads and projects. All too often information is either lost or not available because it is not stored in one centralized location.

The Economic Development Department has researched several CRM systems which offer EDO features and platforms and would like to move forward with Microsoft Dynamics with PA Group USA. Microsoft Dynamics allows for all the features listed above and includes on-going support, the program is also cloud based and grants access remotely and ability to enter the data remotely. The cost is listed below:

· Implementation Services of $7,525

· Total Licensing costs will be $204 per month for the first year, which includes licensing for the Dynamics 365 base application, the discounted EDO Accelerator, and Support.

· Basic Advice & Admin Support included in CSP licensing

· Total is $9,973 in first year

Updating the CRM has been top of mind for about two years. We refrained from doing several print ads earlier this year, as we evaluated which ones would yield the best results. Therefore, we would like to request transfer of funds from Advertising to Technical in the amount of $8375.00 which includes the cost of implementation and four months of subscriptions fees. In the future we will budget $204 per month in Technical for FY 17-18 for the ongoing subscription fee.

Staff is requesting a budget transfer of $8375.00 from Economic Development - Advertising (10011616-55540) to Economic Development - Technical (10011616-53340).

Staff recommends the Mayor and City Council hear the budgetary transfer request for the purchase and implementation of the Microsoft Dynamics and approve the budget transfer.