From:	AMO Communications <Communicate@amo.on.ca>
Sent:	Monday, January 13, 2020 6:01 PM
To:	Monica Hawkins
Subject:	AMO-Frequency Foundry Digital CRM Pilot - Call for Submissions

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January 13, 2020

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AMO-Frequency Foundry Digital CRM Pilot for Small Municipalities – Call for Submissions

Dear Members,

Last year, after a competitive procurement process, AMO <u>announced a partnership</u> with Frequency Foundry, a digital citizen relationship management (CRM) provider to offer members the benefits of online 3-1-1 technology. In the RFP, AMO required that the successful partner offer a pilot program to ensure that the technology can be scalable to municipalities of all sizes in Ontario. In particular, that a digital CRM can be implemented for small, rural, northern, and/or remote municipalities.

CRM software allows municipalities to manage internal and external relationships and the data associated with those interactions. Through CRM technology, your residents can submit 3-1-1 requests, track their case submission from start to completion, and access other features so that they know their municipality is serving their needs. CRM technology can also be used to enhance and improve internal administration and operations across all municipal departments potentially aiding municipalities in finding efficiencies and cost savings.

AMO and Frequency Foundry want to pilot the Dynamics 365 <u>Signal 3-1-1</u> solution with two, small municipalities. One pilot will have a population under 10,000. The other will have a population of 10,000 to 25,000. Pilots will be able to test Frequency Foundry's Signal 3-1-1 solution for three months.

Interested municipalities should answer the following questions in their submissions:
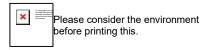
1. Name of Municipality

2. What is the population of your municipality? (based on most recent Census)

3. What is the state of readiness of your municipality? Is your municipality prepared to implement a digital CRM solution? Please provide documentation. For example, proof of council support (i.e. resolution), letter from CAO stating municipality's readiness, etc.

4. Implementation costs will be covered by Frequency Foundry but user licenses (seats) will require the successful pilot to cover those costs. A small municipality should be able to operate the solution for approximately $2,000 per month with a minimum of five users. The Ministry of Municipal Affairs and Housing modernization funding from last spring could potentially be used towards this pilot. Does your municipality have budget dollars for 2020 allocated towards an initiative such as operating a CRM?

5. Promoting the success of the pilot will require staff within your municipality to participate with AMO and Frequency Foundry in developing a case study (for a report, webinars, presentations at events such as the AMO Conference, etc.) Does you municipality consent to participate as a case study for promotional purposes?

AMO will also require the pilots to answer a follow up questionnaire at the conclusion of the test period as part of AMO's reporting of the project to the membership.

Submissions are due **Friday, February 14 at 4:30:00pm (EST)**. Please email your submission to Nicholas Ruder, AMO/LAS Research Advisor at nruder@amo.on.ca. Questions about the pilot project can also be directed to the same contact.

Submissions will be reviewed by an AMO committee with support from Frequency Foundry.

*Disclaimer: The Association of Municipalities of Ontario (AMO) is unable to provide any warranty regarding the accuracy or completeness of third-party submissions. Distribution of these items does not imply an endorsement of the views, information or services mentioned.

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