

Citizen Relationship Management



*Prepared for the
State of Mississippi
Office of Governor*

December 29, 2008

Citizen Relationship Management

Citizen Relationship Management is the practice of tracking citizen requests, reports, complaints and compliments and responding to those requests in an effort to serve the citizens better.



Intranet Quorum

Intranet Quorum (IQ) is the nation's leading browser-based Citizen Relationship Management system.



IQ Functionality Includes:

- **Citizen Database**
- **Correspondence Management**
- **Workflow & Case Tracking**
- **Event Tracking**
- **Internet Mail Management**
- **Boards & Commissions**
- **Press Management**
- **Reports**



Home and
Business
Address

A Quick Look at the IQ System . . .

IQ Help | People | Tools | Events | Legislative | Press | Projects | IMA | Setup | Log Off

Return to Summary | Pick Again

Prefix: Mr. First: Howard Middle: Armour Last Name: Davis Suffix: Appellation:

Primary: Business

Org 1: County Transportation Department

Org 2:

Title: Director

Addr 1: 555 Butler Avenue

Addr 2:

City: St. Paul State: MN - Minnesota Zip: 55103

County: CRTE Precinct: District:

Communications			
Type	Number	Description	Prmry
Business Phone	555-2136	Direct	<input checked="" type="checkbox"/>
Home Phone	555-2792		<input type="checkbox"/>
Internet Address	hdavis@isp.gov	email	<input type="checkbox"/>
			<input type="checkbox"/>

Sal 1: Howard Sal 2:

Birthday: 12/30/1949

People Information: Called regarding funding for State Road improvements 4/19/99.

Affiliations: GOV.CNTY - County Governm VIP - Very Important Person

Unlimited
contact
information

Unlimited
Text Field

People, not documents are the heart of the IQ System. Multiple addresses, contact methods, codes and ad-hoc information is easily recorded for fast retrieval.

User
created
unlimited
codes



More detailed view

A Quick Look at the IQ System . . .

The screenshot displays the 'People Summary' for Mr. Howard Armour Davis (7008258). The interface includes a navigation bar with tabs like 'People', 'Tools', and 'Events'. Below the navigation, there are buttons for 'Show All', 'Hide All', 'Show General Information', 'Edit Person', 'Add a New Address', 'Delete an Address', 'Assign as Agency Contact', and 'Display Label Address'. The 'Show All' button is circled in red. The 'Mail Summary' section shows two pending letters, with the 'Repeat Last Letter' button highlighted by a red box. The 'Workflow Summary' section shows one open workflow, with the 'Add Workflow' button circled in red. The 'Event Summary' and 'Projects Summary' sections show zero associated events and projects, respectively. The 'Add Event' and 'Add Project' buttons are also visible.

Time-saving features

Add new requests

The People Summary Screen presents all citizen data for each individual. A complete history of postal mail, telephone, internet mail, fax, field interviews and office visits are quickly and easily reviewed.

A Quick Look at the IQ System . . .

People Edit - Dr. A. Harley Smith - Microsoft Internet Explorer

File Edit View Go Favorites Help

[IQ Help](#) [IQexpress](#) [People](#) [Tools](#) [Events](#) [Legislative](#) [Press](#) [Projects](#) [IMA](#) [Setup](#) [Log Off](#)

[Return to Summary](#) [Pick Again](#) [IQ Mail](#)

Prefix	First	Middle	Last Name	Suffix	Appellation
Dr.	A.	Harley	Smith		

Primary	<input checked="" type="checkbox"/> Business	County		CRTE	19
Org 1	AW Smith Sporting Goods	Precinct		District	0
Org 2					
Title	Manager IV	Communications			
Addr 1	719 South Harris Street	Type	Number	Description	Pmry
Addr 2		Business Phone	601-552-5777		<input checked="" type="checkbox"/>
City	MN				<input type="checkbox"/>
State	MS - Mississippi				<input type="checkbox"/>
Zip					<input type="checkbox"/>

Primary	<input type="checkbox"/> Business	County	770	CRTE	27
Org 1		Precinct		District	0
Org 2					
Title	Manager II	Communications			
Addr 1	2167 Northlake Parkway	Type	Number	Description	Pmry
Addr 2	Ste 102	Home Phone	(601) 939-1280		<input checked="" type="checkbox"/>
City					<input type="checkbox"/>
State	MS - Mississippi				<input type="checkbox"/>
Zip					<input type="checkbox"/>

IQ People allows your staff to easily make changes to existing people records.

A Quick Look at the IQ System . . .

The screenshot displays a web browser window titled "People Edit - Mr. Howard Armour Davis - Microsoft Internet Explorer". The address bar shows the URL: http://iqsmp:800/tc_asp/tc_add_people.asp?pid=7008258. A "Web Page Dialog" window titled "Address Verification Results Page" is open, showing the following information:

Address As Entered
County Transportation Department
555 Butler Avenue
St. Paul, MN -- Minnesota 55155

Address Results **OK**

Company County Transportation Department

Line 1 555 Butler Avenue West

Line 2

City, St ZIP Saint Paul, MN -- Minnesota, 55118

Location Information

Congressional District: 04	Carrier Rt: C017
County: DAKOTA	Delivery Pt: 55 6
Area Code: 612	PO Type: Regular ZIP Code
Time Zone: Central	Address Type: Street or Residential
Latitude: 44.90	
Longitude: 93.10	

Postal Information

Buttons:

The background form shows fields for Prefix (Mr.), Primary (Business), Org 1 (County Transportation Department), Title (Director), Addr 1 (555 Butler Avenue), City (St. Paul), State (MN -- Minnesota), Zip (55155), Sal 1 (Howard), Birthday (12/30/1949), and Affiliations (GOV.CNTY-).

Verified
as a valid
address

Address
Info
enhanced

Addresses entered into the IQ system are verified against an address verification and standardization database.

A Quick Look at the IQ System . . .

Name Search

First and Last or Last Name
(for example, John De_Angelis)

Address (optional)

Type (soundex returns names that sound similar)
Exact Match

Search Reset

Search Help...

- **First and Last or Last Name Search.** Enter the name as **First Last** or just **Last**. If searching for a two-word last name, type the underscore character (**_**) instead of a space, for example De_Angelis.
- **Address Search.** Enter any word or phrase that must appear in the address to be included in the search results. This search is used in conjunction with a name search. Enter a percent sign (**%**) in the Name field along with an address or portion of an address (for example, Main Street) to find everyone who lives at that address (or on that street).
- **Type of Search.** A soundex search returns any names that sound similar. An exact match search returns any names that match exactly, including letter case. An ignore case search works like an exact match search except that it ignores letter case.

Search for exact matches or names that sound similar

IQ Search Screens are of a common style and format. Each search screen provides easy to use options with informative tips printed right on the screen.

A Quick Look at the IQ System . . .

Microsoft Word - Internet Response.doc

February 3, 2000

Ms. Esther P. Jeffries
201 North Carolina Avenue
DeLand, Florida 32720

Dear Esther:

One of our greatest responsibilities as citizens is to protect the rights of animals in our shared habitat. That is why I am so pleased to receive your recent email conveying your heartfelt concern for animal rights. I strongly agree that action must be taken to review our current system to strengthen the laws protecting pets and wildlife alike.

Page 1 Sec 1 1/1 At 2.1" Ln 7 Col 1

Other Options Switch Edit Document Add Workflow Attachments Delete Mail

Letter
production
functions
w/ MS
Word

Correspondence is simple with IQ's mail creation features, which include the ability to handle variable text processing, "ad-hoc" text, letter formats, letter review and correction, letter templates and library creation and update.

Define relevant fields

A Quick Look at the IQ System . . .

Case Summary - 105181 - No Primary Person
This workflow is active and assigned to QC.

[Show All](#) [Hide All](#) [Hide General Information](#) [Show Possible Agency Contacts](#) [Hide Associated People](#) [Edit Workflow](#) [Add Workflow Notes](#)

Workflow Information The workflow status is **Open**, it was created by QC, the priority is **9**.
The workflow was opened on **05/14/1999 03:30 PM**, the due date is **05/28/1999 03:30 PM**.

Comments *Inquired about census workers in her neighborhood.*

User-Defined Fields SS # , ID # , Date , Holidays , ORIG_EMAIL , ORIG_NAME , ORIG_TRANS , Orig_Name , Orig_Email , Orig_Trans

Workflow Codes CASE-casework, CENSUS-Bureau of Census, HHS-Dept. of Health and Human Services

People [Mrs. Esther Jeffries](#)
Organization for Testing, 2000 North Carolina Avenue, NW, Washington, DC 20015, [Incoming](#) [*Outgoing](#)
202-555-4685, 202-555-5446, epjeffries@erols.com

[Attach People](#) [Detach People](#) [Add Step Notes](#) [Set Remind/Due Date](#) [*Attach Pending](#) [*Attach WP Document](#) [*Attach Object](#) [*Attach Word Document](#) [Complete Step](#) [Release Ownership](#) [Reassign](#)

Active [In: 2009745 / Our: 2106894](#) SZHANG 5/14/1999 03:29 PM [Mrs. Esther Pearl Jeffries](#)
closed [2345678](#)
Perwsonal letter regarding taxes.

5/14/1999 03:30 PM

Attach photos, documents, and scanned images

Set Remind dates for follow-up

Workflow is used to track and route citizen requests and other office projects and tasks. IQ provides two levels of workflow -- workflow managed entirely within the IQ system and IQ Extended Workflow that can be routed to and from non-IQ users via email. Extended Workflow is available as an add-on module.

Track by
topic

A Quick Look at the IQ System . . .

Event Entry - Microsoft Internet Explorer
Address: http://iqsmp.800/tc_asp/ev_edit.asp?id=new

IQ Help People Tools Events Legislative Press Projects IMA Setup Log Off

Daily Schedule

Date: 05/05/1999 For: Quorum Control
Begin: 10:00 AM End: 11:00 AM Time Zone: Central
Status: Approved Private Major

Summary: Budget Review Meeting

Notes: IT infrastructure and Citizen Service

Topics: [?] [?] [?]

Private or
Shared
Events

Event Tracking is a group scheduling system that is fully integrated with the citizen database (People module). With IQ you can manage conflicting appointments, link events to citizen records, and keep a complete and searchable record of all past, current, and future appointments by type, topic, and other criteria.

A Quick Look at the IQ System . . .

Route
email to
appropriate
staff

E-Mail Exception Handler sorted by Ascending Date

From To

Staff Issue

18 of 18 E-Mail(s) available.

Date	E-Mail Address	Subject	Exception Reason(s)	
08/03/1999	IN05ima.pub@mail.house.gov	RE: RE: IMA Configuration Test - Auto Reply	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 1
08/03/1999	Ralph Zendejas <rzendejas@sada.net>	RE: Responding to your message	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 2
08/03/1999	bababoey@flash.net	Acknowledgement of Gun Control Reply	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 3
08/03/1999	IN05ima.pub@mail.house.gov	RE: RE: DE-IMA Configuration Test - Auto Reply	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 4
10/26/1999	Jefferson_Trudeau2ac-desktop.com	Bad email address in tag (autoreply test)		<input type="checkbox"/> 5
10/27/1999	No E-Mail address provided	TEST3	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 6
10/27/1999	No E-Mail address provided	TEST2	Message was diverted to exception handler based on IMA Preferences.	<input type="checkbox"/> 7

IQ's Internet Mail Agent (IMA) provides email management tools for routing, tracking, and answering email.

A Quick Look at the IQ System . . .

People List Select Criteria - Microsoft Internet Explorer

Address: http://iqsmp:800/tc_esp/select_edit.asp?class_name=CONSTITUENT&query_name=

IQ Help People Tools Events Legislative Press Projects IMA Setup Log Off

Return

People List Select Criteria

Name: HIGHWAYFUNDING Create Date: 5/5/1999

Staff: Johnston, David Last Run: [?]

Type: Household Finished: [?]

Sort Order: Name Number: [?]

Description: List created for outreach mailing to up

(Table Name	Field Name	Relator	
[?]	Affiliation	Code	EQ	State Hig
[?]	Incoming Issues	Issue Code	EQ	Highway
[?]	Address	Zip Code	[?]	
[?]			[?]	
[?]			[?]	
[?]			[?]	
[?]			[?]	
[?]			[?]	
[?]			[?]	
[?]			[?]	

Field Names for the Address T... [?]

Make a selection from the list:

- Address Line 4 (foreign only)
- City
- County
- Descriptor
- Organization Line 1
- Organization Line 2
- Primary
- State
- Zip Code**

OK Cancel

http://iqsmp:800/tc_ Local intranet zo

Pop-up boxes help users navigate

IQ allows users to easily manage lists by virtually every criteria stored in the IQ database. Lists are quickly and easily produced with the IQ select processor. They can also use the select lists to generate targeted mailings based upon any cross-section of information in the database.

A Quick Look at the IQ System . . .

Board Seat List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

[IQ Help](#)
[IQexpress](#)
[People](#)
[Tools](#)
[Events](#)
[Press](#)
[Boards](#)
[Taxi Cab](#)
[Projects](#)
[IMA](#)
[Setup](#)
[Log Off](#)

[Board by Name](#)
[Search Again](#)
[Return to Summary](#)
[Board Search](#)
[Membership Activity](#)
[Select Processor](#)
[Other Searches](#)
[Add Board](#)
[Update Codes](#)
[IQ Mail](#)

Board Seat List

Board Name : [Disabled Veterans Commission](#)

Seat List								
Seat/Notes	Member Name		Begin Term	End Term	Appointing Authority		Confirm	Term Length
seat 1	Ms. Ann Stidd	Edit	02/07/2000	01/31/2001	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
seat 2	Mr. John Jacobson	Edit	01/01/2000	12/31/2000	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
seat 5			02/01/2000	12/31/2000	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
seat 6			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
seat 7			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
seat 8			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

[Show All](#)
[Hide All](#)

Seat	Member Name	Begin Term	End Term	Status
There are NO CURRENT Members Pending Seat Appointment				Hide
There are 1 CANDIDATE members				Show
There are 2 FORMER members				Show

IQ Boards & Commissions module maintains a detailed membership list for each Board.

A Quick Look at the IQ System . . .

The screenshot shows a web browser window with the URL http://iq_board:800/tc_esp/tc_con_summary.asp?people_id=7009471. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page has a navigation menu with links for IQ Help, IQexpress, People, Tools, Events, Legislative, Press, Boards, Taxi Cab, Projects, IMA, Setup, and Log Off. Below this is a secondary menu with Search Again, Pick Again, Add to Household, Add People, No Prior Person, No Next Person, and IQ Mail. The main content area is titled "Disabled Veterans Commission - 7009471 - Board Summary" and contains several sections: "General Information" (no other members), "Business*" (address: 12379 Jefferson Davis Highway, Suite 400, Arlington, VA 23445), "Affiliations" (EMPTY-Empty), "Board Information" (Contact Name, Board Chairman, Expiration Date: 12/31/2002, Board Type: ADVISORY, Number of Seats: 8, Purpose, Meetings, Seat Restrictions, Compensation), "Board Members" (Show All, Hide All, Show Current Only; note: 2 current members, 3 other members), and "Other Information" (added to database 02/02/2000). A toolbar at the top of the content area includes Show All, Hide All, Hide General Information, Edit Board, Add a New Address, Delete an Address, Assign as Agency Contact, and Display Line Address.

The IQ Boards & Commissions Summary Page summarizes membership and contact information.

A Quick Look at the IQ System . . .

Add Board Membership - Microsoft Internet Explorer

File Edit View Favorites Tools Help

[IQ Help](#) [IQexpress](#) [People](#) [Tools](#) [Events](#) [Press](#) **[Boards](#)** [Taxi Cab](#) [Projects](#) [IMA](#) [Setup](#) [Log Off](#)

[Board by Name](#) [Search Again](#) [Return to Summary](#) [Board Search](#) [Membership Activity](#) [Select Processor](#) [Other Searches](#) [Add Board](#) [Update Codes](#) [IQ Mail](#)

Add Board Membership

Member Name	Mark Searle		
Board	Test Board ?	Seat	seat 1 ?
Appointed By	COUNCIL - Cour ?	Appointment Type	
Appointment Status			
Status	Formal Candidate	Application Received On	4/3/2000
Term Begins		Term Ends	
Appointed On		Confirmed On	
Resigned On		Resignation Reason	
Member Characteristics			
Marital Status	Married	Gender	Male
Political Party		Occupation	Senior Executive
Ethnic Origin		Disabled	No
Background Review			
Assigned To	Tester, Testy	Assigned On	04/03/2000
Background Type	Complete Background Check	Due Date	

IQ Boards & Commissions maintains accurate records for Board Members and tracks appointment status.

A Quick Look at the IQ System . . .

Document Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

[IQ Help](#) [IQexpress](#) [People](#) [Tools](#) [Events](#) [Legislative](#) [Press](#) [Projects](#) [IMA](#) [Setup](#) [Log Off](#)

[Press Search](#) [Add Document](#) [Add Request](#) [Add Organization](#) [Add Contact](#) [Add Scan](#) [Document Library](#)

Document Search

Search Type

| [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [Other](#) | [All](#)

Document Name Includes	<input type="text"/>	Document Title Includes	<input type="text"/>
Issue Code	<input type="text"/> ?	Note Includes	<input type="text"/>
Document Type	<input type="text" value="Press Release"/>	Document Create Date	From <input type="text"/> To <input type="text"/>
Document Status	<input type="text"/>	Created by	<input type="text" value="Control, Quorum"/>
Sort Order			
<input checked="" type="radio"/> Name <input type="radio"/> Title <input type="radio"/> Create Date <input type="radio"/> Created By <input type="radio"/> Type <input type="radio"/> Status			

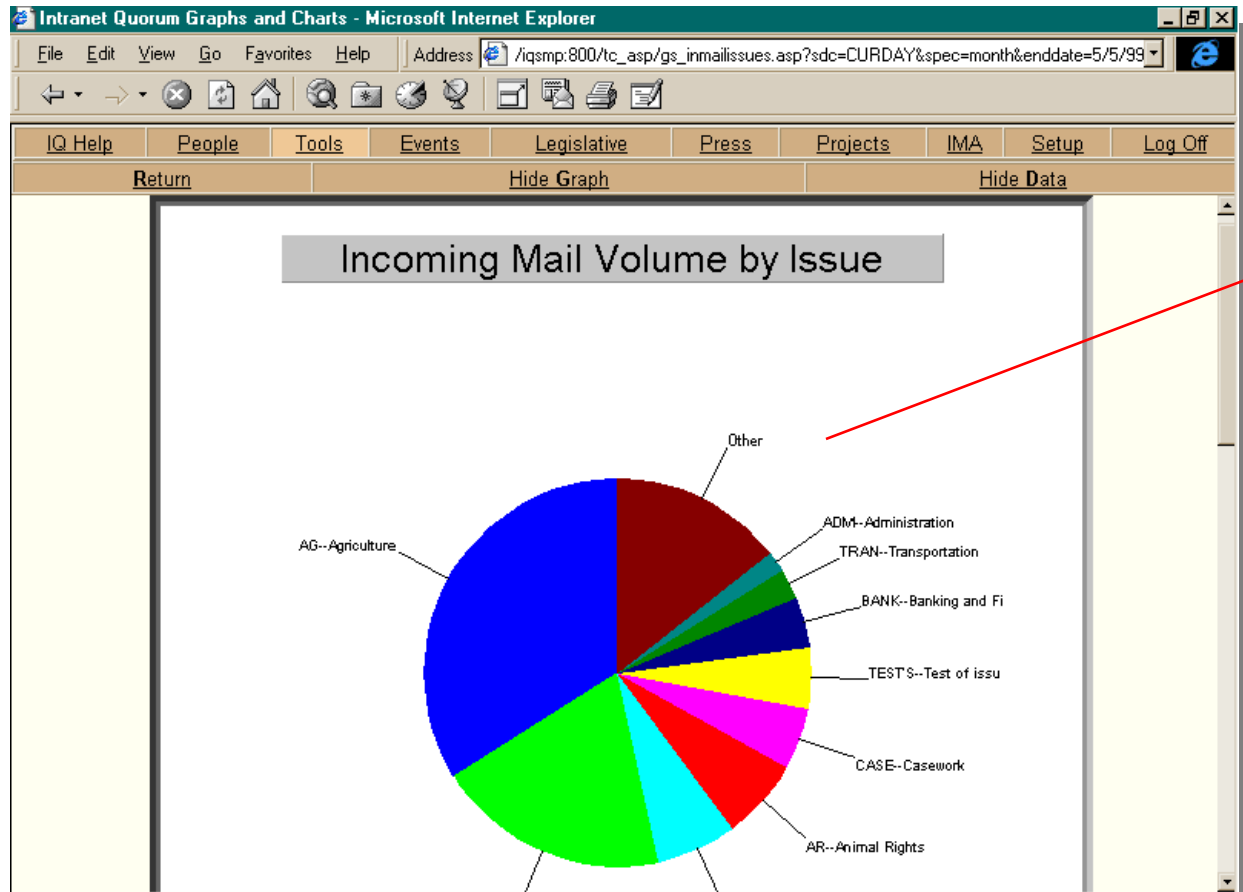
Search Help...

- **Document Name Search.** Enter the document name or portion of the name in any case. Enter a string of characters to find all documents with that string anywhere in their name.

Search for
press
documents
by
numerous
fields

IQ Press allows easy access to your press documents which include such information as media type, related issues, press status and any related notes. IQ tracks media organizations and contacts, requests for interviews and media documents such as press releases. In addition, users can scan documents such as newspaper articles into an extensive library.

A Quick Look at the IQ System . . .



Colorful charts and graphical analysis

IQ Tools supplements a rich variety of text-based reporting options with charts and graphs that provide trend data for analysis.



Latest Technology

- **Web-based design** — *easy-to-use interface, increased speed & flexible environment*
- **Oracle database** — *the ideal platform for data warehousing applications of every size and scope*
- **Intranet Security** — *unique user accounts with Microsoft NT and Oracle security*

The CRM = IQ Message

- Efficiency and service to the citizen is primary focus
- A Web-based solution delivers the future platform needed for exceptional customer/citizen service
- Ensuring all areas of the organization have easy access to citizen information
- Minimal risk solution with flexibility and scalability to support future requirements
- Emphasis on ease-of-use



Similar Projects

Applying our Successful Experience

- Fairfax County
- Georgia Governor
- Minnesota Governor
- Virginia Governor
- Arlington County (new)
- Alabama Governor (new)
- White House
- U.S. House of Representatives
- U.S. Senate





Building Stronger, One-to-One Citizen Relationships

