

# 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 . . .

The screenshot shows a web browser window displaying the 'People' form in the IQ System. The form is for a person named Howard Armour Davis. It includes fields for Prefix (Mr.), First (Howard), Middle (Armour), Last Name (Davis), Suffix, and Appellation. The Primary contact type is set to 'Business'. The address is 555 Butler Avenue, St. Paul, MN 55103. The title is Director. The form also includes a 'Communications' table with three entries: Business Phone (555-2136, Direct), Home Phone (555-2792), and Internet Address (hdavis@isp.gov, email). The 'Affiliations' section lists 'GOV.CNTY - County Governm' and 'VIP - Very Important Person'. A 'People Information' text field contains the note: 'Called regarding funding for State Road improvements 4/19/99.' The browser's address bar shows 'Return to Summary' and 'Pick Again' buttons. The browser's menu bar includes 'IQ Help', 'People', 'Tools', 'Events', 'Legislative', 'Press', 'Projects', 'IMA', 'Setup', and 'Log Off'.

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"/>

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 . . .

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

Search Again | Pick Again | Add to Household | Add to Organization | Add People | Prior Person | Next Person

**Mr. Howard Armour Davis - 7008258 - People Summary**  
**Restricted Access**

[Show All](#) | [Hide All](#) | [Show General Information](#) | [Edit Person](#) | [Add a New Address](#) | [Delete an Address](#) | [Assign as Agency Contact](#) | [Display Label Address](#)

**General Information** There are no other members of this household in the database.

[Hide Pending Mail](#) | [Show Closed Mail](#) | [Add Incoming](#) | [Add Outgoing](#) | [Repeat Last Letter](#) | [Display as Table](#) | [Sort Ascending Date](#)

**Mail Summary** Mr. Davis has 2 pending letters and 3 closed letters.

1	<b>Pending</b>	Outgoing: <a href="#">2120492</a> , Method: <b>usmail</b> , Issues: <b>AB - Abortion</b> , Aide: <b>QC</b> Response: <a href="#">lau3</a> , Type: <b>tmail</b> , Path: \\iqdatabase\dos\public\form\lau3.doc
2	<b>Pending</b>	Outgoing: <a href="#">2117000</a> , Method: <b>usmail</b> , Issues: <b>ADM - Administration</b> , Aide: <b>QC</b> Response: <a href="#">test fillins</a> , Type: <b>tmail</b> , Path: \\iqsmp\dos\public\form\test fillins.wpd

[Hide Open Workflows](#) | [Show Closed Workflows](#) | [Add Workflow](#) | [Display as Table](#) | [Sort Ascending Date](#)

**Workflow Summary** Mr. Davis has 1 open workflow and 1 closed workflow.

1	<a href="#">106061</a> . This <b>Open, Active, priority 9</b> , Case is assigned to <b>qc</b> and involves <a href="#">Mr. Howard Armour Davis</a> . It was opened on <b>07/19/1999</b> by <b>qc</b> .
---	--

[Add Event](#)

**Event Summary** Mr. Davis has 0 associated events.

[Add Project](#)

**Projects Summary** Mr. Davis has 0 open project(s) and 0 closed project(s).

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	<b>Communications</b>							
Addr 1	719 South Harris Street	Type	Business Phone	Number	601-552-5777	Description		Pmry	<input checked="" type="checkbox"/>
Addr 2									<input 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	<b>Communications</b>							
Addr 1	2167 Northlake Parkway	Type	Home Phone	Number	(601) 939-1280	Description		Pmry	<input checked="" type="checkbox"/>
Addr 2	Ste 102								<input 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 shows 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](http://iqsmp:800/tc_asp/tc_add_people.asp?pid=7008258). A "Web Page Dialog" titled "Address Verification Results Page" is open over the main application. The dialog contains the following information:

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

**Address Results** **OK**

**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 application shows a form for "Mr. Howard Armour Davis" with 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), and Birthday (12/30/1949).

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 . . .

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

Search Again | Pick Again | Go to Person | **IQ Mail**

Mrs. Esther Pearl Jeffries - Incoming and Outgoing

**Incoming ID 2019275**

Method: Internet Mail  
Date In: 02/04/2000  
File#: 00-4236  
Group:

**Incoming Comments**

**Outgoing ID 2118140**

Method: Fax  
LtrDate: 02/02/2000  
Staff: Haring, David  
Last Batch: *Never Batched*

**Outgoing Comments**

Mailing Address: **Primary Home**  
epjeffries@erols.com

Form Letter Name: # letter - \\qsm

Envelope: \\dos\public\fo

Microsoft Word - Internet Response.doc

File Edit View Insert Format Tools Table Window Help

Normal Arial 12 B I U ABC x<sup>2</sup>

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 REC TRK EXT OVR WRH

Save as Pending

**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,  
202-555-4685, 202-555-5446, epjeffries@erols.com [Incoming](#) [\\*Outgoing](#)

<a href="#">Attach People</a>	<a href="#">Detach People</a>	<a href="#">Add Step Notes</a>	<a href="#">Set Remind/Due Date</a>	<a href="#">*Attach Pending</a>	<a href="#">*Attach WP Document</a>	<a href="#">*Attach Object</a>	<a href="#">*Attach Word Document</a>	<a href="#">Complete Step</a>	<a href="#">Release Ownership</a>	<a href="#">Reassign</a>

Active  
Process Case  
5/14/1999 03:30 PM

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

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

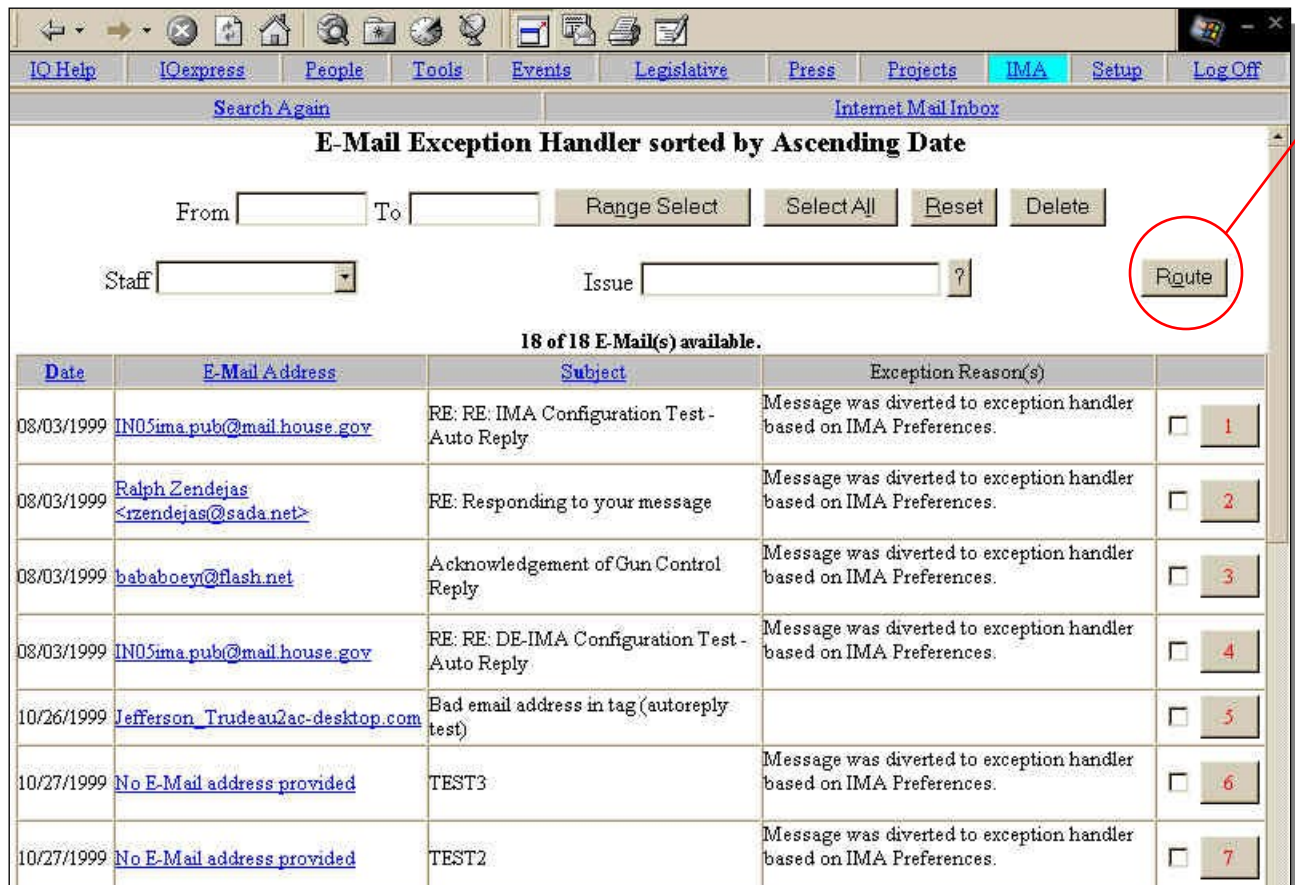
Topics: [?]

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



Search Again Internet Mail Inbox

### E-Mail Exception Handler sorted by Ascending Date

From  To

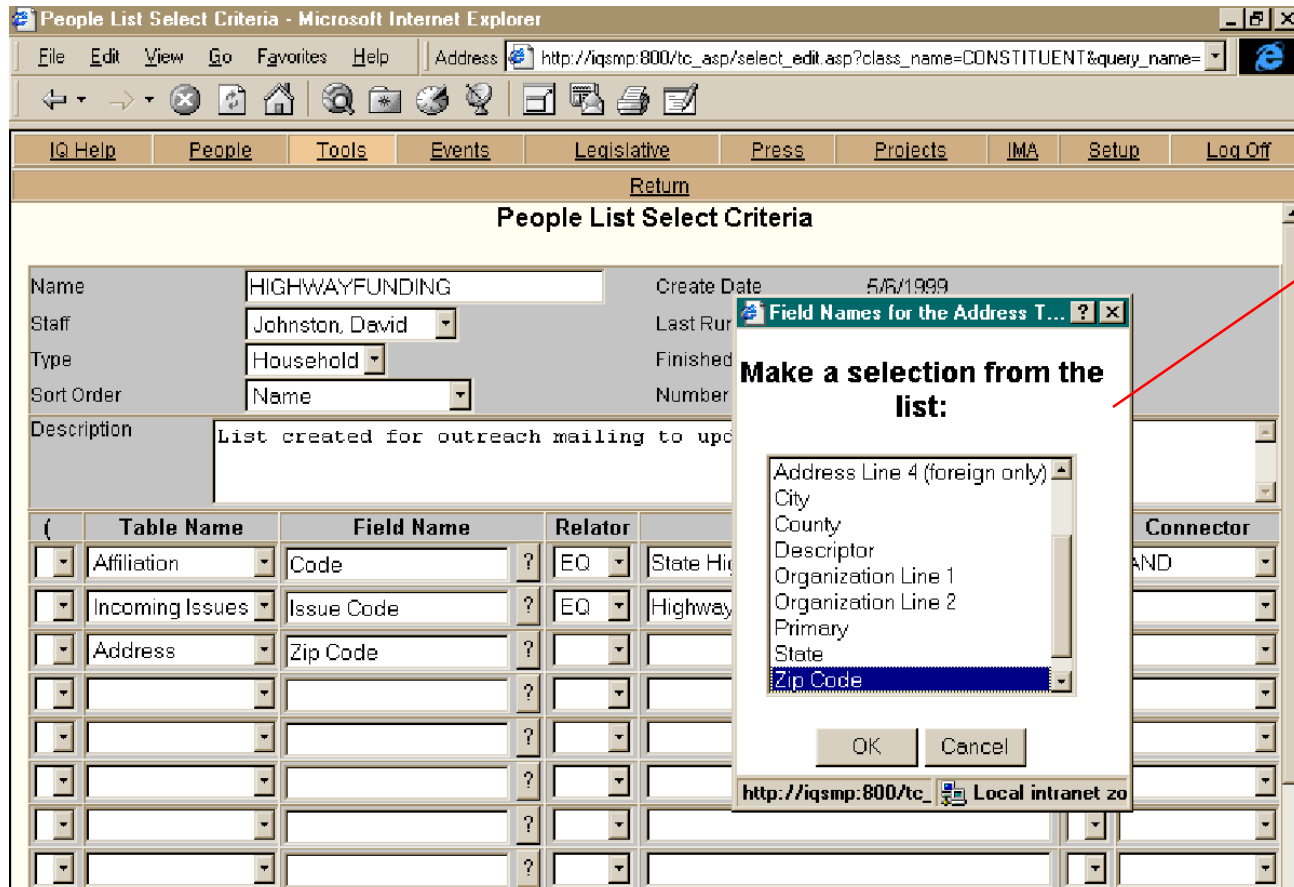
Staff  Issue

18 of 18 E-Mail(s) available.

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



The screenshot shows a web browser window titled "People List Select Criteria - Microsoft Internet Explorer". The address bar shows the URL: [http://iqsmp.800/tc\\_esp/select\\_edit.asp?class\\_name=CONSTITUENT&query\\_name=](http://iqsmp.800/tc_esp/select_edit.asp?class_name=CONSTITUENT&query_name=). The browser has a menu bar (File, Edit, View, Go, Favorites, Help) and a toolbar with navigation icons. Below the browser is a navigation menu with tabs: IQ Help, People, Tools, Events, Legislative, Press, Projects, IMA, Setup, Log Off. A "Return" button is centered below the menu. The main content area is titled "People List Select Criteria" and contains a form with the following fields:

- Name: HIGHWAYFUNDING
- Staff: Johnston, David (dropdown)
- Type: Household (dropdown)
- Sort Order: Name (dropdown)
- Create Date: 5/5/1999
- Last Run: (empty)
- Finished: (empty)
- Number: (empty)
- Description: List created for outreach mailing to up

Below the form is a table with columns: Table Name, Field Name, Relator, and Connector. The table contains several rows, with the first row having "Affiliation" as the Table Name and "Code" as the Field Name. A pop-up dialog box titled "Field Names for the Address T..." is overlaid on the table. The dialog box contains the text "Make a selection from the list:" and a list of field names: Address Line 4 (foreign only), City, County, Descriptor, Organization Line 1, Organization Line 2, Primary, State, and Zip Code. The "Zip Code" field is selected. The dialog box has "OK" and "Cancel" buttons and a URL bar at the bottom showing "http://iqsmp.800/tc\_esp 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
<a href="#">seat 1</a>	Ms. Ann Stidd <a href="#">Edit</a>	02/07/2000	01/31/2001	<input type="text"/> ?	<input type="checkbox"/>	<input type="text"/>
<a href="#">seat 2</a>	Mr. John Jacobson <a href="#">Edit</a>	01/01/2000	12/31/2000	<input type="text"/> ?	<input type="checkbox"/>	<input type="text"/>
<a href="#">seat 5</a>		02/01/2000	12/31/2000	<input type="text"/> ?	<input type="checkbox"/>	<input type="text"/>
<a href="#">seat 6</a>		<input type="text"/>	<input type="text"/>	<input type="text"/> ?	<input type="checkbox"/>	<input type="text"/>
<a href="#">seat 7</a>		<input type="text"/>	<input type="text"/>	<input type="text"/> ?	<input type="checkbox"/>	<input type="text"/>
<a href="#">seat 8</a>		<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 <b>NO</b> CURRENT Members Pending Seat Appointment				<a href="#">Hide</a>
There are <b>1</b> CANDIDATE members				<a href="#">Show</a>
There are <b>2</b> FORMER members				<a href="#">Show</a>

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](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:** There are no other members of this household in the database.
- Business \*:** Disabled Veterans Commission, 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:** Includes links for Show All, Hide All, and Show Current Only. Below these links, it states: "This board has 2 current members and 3 other members".
- Other Information:** This Constituent was added to the database 02/02/2000.

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	
<b>Appointment Status</b>			
Status	Formal Candidate	Application Received On	4/3/2000
Term Begins		Term Ends	
Appointed On		Confirmed On	
Resigned On		Resignation Reason	
<b>Member Characteristics</b>			
Marital Status	Married	Gender	Male
Political Party		Occupation	Senior Executive
Ethnic Origin		Disabled	No
<b>Background Review</b>			
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: Document Search

| A | B | C | D | E | E | 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:

Document Title Includes:

Issue Code:  ?

Note Includes:

Document Type: Press Release

Document Create Date: From  To

Created by: Control, Quorum

Document Status:

Sort Order:  Name  Title  Create Date  Created By  Type  Status

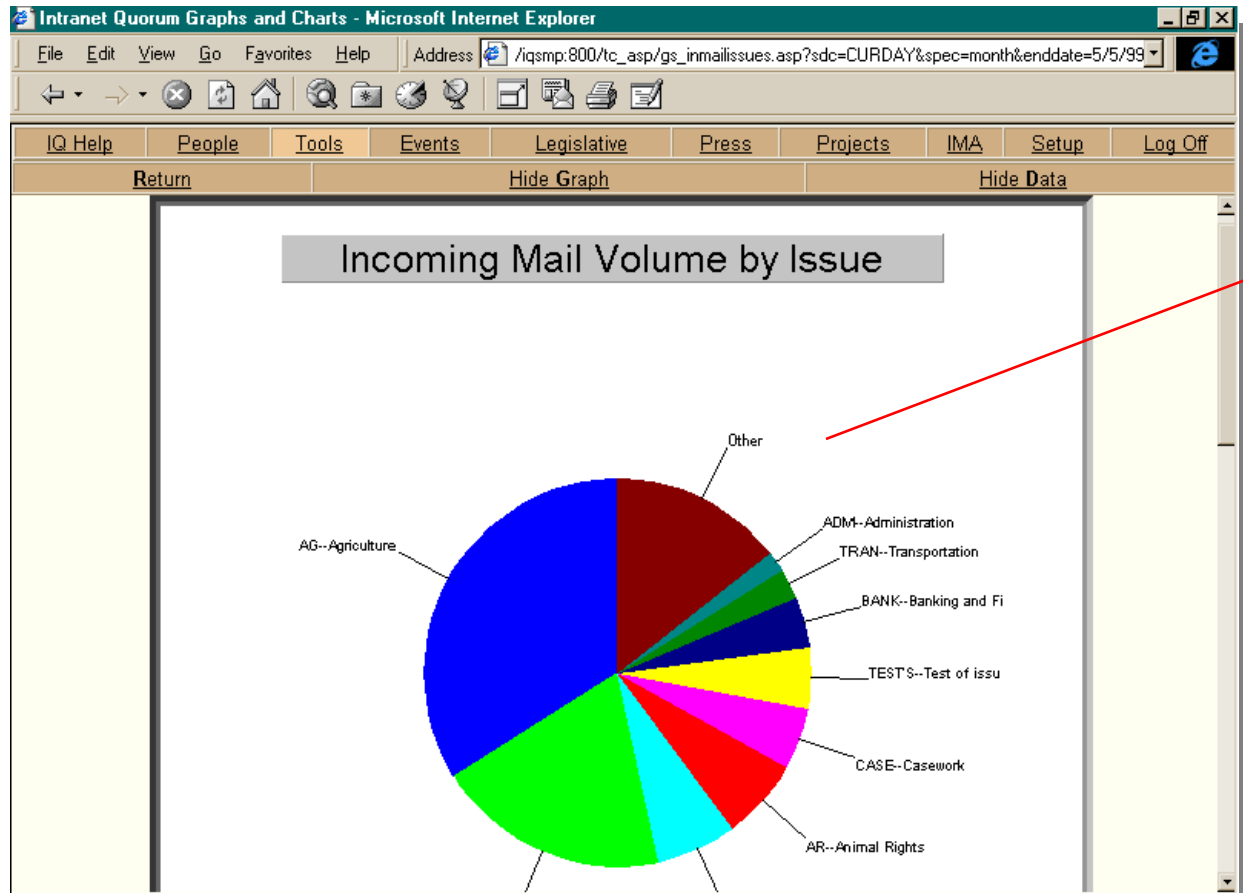
Search Help...

- **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

