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Citizen Engagement Platform



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A Complicated Situation

Following the economic woes of 2008, government entities continue to do more with less and will need to find innovative ways of reducing costs while improving services to citizens. Additionally, states face enormous responsibility for building and integrating new, shared solutions around critical functions such as healthcare, taxation, labor and employment and education, without a clear roadmap for better decision-making across the multiple organizations. The private sector is fighting the same battle with economic trends and pressures, but the most successful companies have learned a valuable lesson that will enable their long term success, which is:

**Customers are the lifeblood of
all organizations.**

Look at any company strategy and you will inevitably find two goals:

- Find new customers
- Retain and nurture current ones

Competition is fierce in all industries. Customer loyalty and lifecycle management is the key to both finding and keeping customers and weathering the economic travails of the time. Within the last thirty years, technology solutions have gained momentum in helping companies establish a comprehensive view of their customer base, giving them the ability to proactively communicate with a customer based on their needs and desires. The 80's brought us *Database Marketing*, the 90's, *Relationship Marketing*, and in the late 1990's, the software industry settled on the term *Customer Relationship Management (CRM)* as the description that would stick and represent the primary way in which companies would engage with and understand their customer base. Over the years, solutions have matured and become increasingly sophisticated, so that companies are enabled to build long lasting and meaningful customer relationships.

CRM solutions house customer information and provide tools that allow companies to better target, converse with and analyze their customers; in return, most companies have found that customer lifecycle management saves money and increases revenue. Educated decision-making, improved customer service and real time reporting also benefit companies utilizing a CRM solution. Companies who excel with these tools often find competitive advantage by communicating new information to their customers in real time and in a way their customers desire. Ensuring those customers have a voice, via social media and other mediums, has added to the viral and explosive growth that some companies have enjoyed in the past few years.

The public sector has lacked proactive outreach and innovation around citizens, the customers of government. Citizen lifecycle management remains passive, reactive and single transaction oriented. Additionally, available software solutions are immature,

undeveloped and duplicative. Many government entities are built around the concept of an 'agency', which is comparative to departments within the private sector. These agencies focus on their own, completely separate operating model and their own citizen experience. With few exceptions, core functionality is duplicated across all the agencies and the public sector continues to build and manage isolated, disintegrated systems for customer management. This makes citizen information difficult to link across federal, state, county and local boundaries and increases technology costs to maintain similar information in multiple places. Citizens themselves are frustrated, since they must update their information across multiple touch points. Case in point, it is not uncommon for people to be required to re-enter the same information on different applications and forms across different governmental agencies. Lastly, government decision-making is difficult without a full view of the citizen. The result is that decision-making remains pocketed to a specific agency and lacks comprehensive evaluation.

Today's View of State Government Agencies



Complicated Solutions

As seen in the graphic above, the opportunity exists for governments to build an enterprise view of their citizens to solve the problem and provide common functionality across multiple agencies. But, governments have proven ineffective at product development across the enterprise. Why?

- Government lacks competition. The constant push for innovation to remain a market leader and become highly efficient is absent from the public sector.
- Technical resources are scarce and many who work in government lack current and critical technical skills needed to build enterprise solutions.
- Governance between states and agencies is problematic. State consortiums and shared services across agencies are cropping up to try to build enterprise systems, but these are cumbersome and difficult to manage due to politics and funding.
- Government relies heavily on external system integrators and internal requests for proposals that lack an enterprise approach. Most government agencies are unaware of what other agencies are soliciting and oftentimes the design of the solutions are completely left to the system integrators who have little knowledge or incentive to see government operate as an enterprise.

Implication of Doing Nothing

Governments could maintain the status quo of siloed and duplicative solutions, but costs will continue to skyrocket due to duplication of data, infrastructure, software maintenance and product support. More and more money will be pumped into building the same infrastructure thousands of times across the country. Citizens will not get the benefit of proactive services and government decisions will continue to be slow, cumbersome and lacking proper analytics.

Specific federal government agencies are recognizing the need for interoperability across various agencies, but, to date, have primarily focused (and funded) only *intra*-agency systems, not more *inter*-agency operable systems. Federal frameworks, such as the Medicaid Information Technology Architecture (MITA), seek to improve interoperability among healthcare systems as it pertains to Medicaid, but it does not address the broader problem around how to manage citizen data across multiple entities outside of healthcare. Federal funding is primarily concerned with a specific topic, such as Department of Labor's Unemployment Insurance or the Center for Medicaid and Medicare Services implementation of the Affordable Care Act, and approaches to design remain singularly focused around those areas.

Interoperability is the ability of diverse systems and organizations to work together (inter-operate).

Wikipedia contributors, "Interoperability," Wikipedia, The Free Encyclopedia, <http://en.wikipedia.org/wiki/Interoperability> (accessed April 10, 2012)

An Elegant Solution

There is a perception within the vendor community that government entities are uniquely different and complex. But, when it comes to citizen engagement, the needs are quite similar to the private sector's Customer Relationship Management platforms.

- **Citizen Management:** A citizen signing up for unemployment insurance should be tracked and contacted similarly to tracking a new customer through the sales

cycle in the private sector. A complete 360 view of their situation may allow a state worker to point them toward other services that will ease their financial burden as they search for a job and assist them in re-entering the workforce. It should allow the citizen to choose the manner in which they can be contacted for specific services and give them a one-stop shop for updating their information.

- **Marketing:** Yes, even government entities may want to market new services to their citizens. New student loan availability, information about parks and recreation, tourism, economic development initiatives, changes to permits and licensing could be combined into a statewide newsletter and delivered to the citizen in their desired correspondence method.
- **Customer Service and Support:** Citizens should be able to contact customer support and get answers to multiple questions at once, as well as update their information and contact preferences. This could also enable more “self help” and online support features which are not fully realized across the public sector.
- **Analytics:** Government needs a full view of citizen involvement to be able to understand the needs of the population and make better decisions in a timely manner. Full views of citizens, even across states, will allow governments to understand how citizen life changes may impact other services (i.e., unemployed citizens increase fishing permit use).
- **Fraud Prevention:** Agencies need to collaborate with each other in order to provide better services to citizens and prevent fraud and unnecessary spending. Understanding how a citizen is engaging in other service areas can be invaluable to citizens engaging in government services and ensuring that the right services are delivered at the right time and at the right cost. Additionally, a more cohesive fraud prevention strategy can reduce costs, so governments can increase services to citizens truly in need.
- **Social Media& Transparency:** Polling and surveying citizens, offering collaborative ways to share information amongst citizens can all be achieved. Crowd sourcing and promoting online neighbors are just some ways governments need to engage with their citizens, as well as allowing citizens to engage with each other and access information.
- **Multi-Channel, Always On:** Governments needs to provide applications that allow citizens to interact through the channel of their choice (phone, web, mobile, etc.) anytime, anywhere.
- **Marketplace:** The private sector has inspired marketplace concepts that allow businesses and consumers to build out processes that give them competitive advantages and innovative ways to “mashup” information and create new solutions. Governments could benefit greatly from being able to buy solutions that integrate seamlessly into their enterprise platform and allow reuse of the citizen information. Google’s Apps Marketplace, Salesforce’s AppExchange and Apple’s App Store are just

Mashups
combine
disparate
data and/or
application
sources that
were not
created to
be used
together.

some examples of how a marketplace concept can spur innovation and competition.

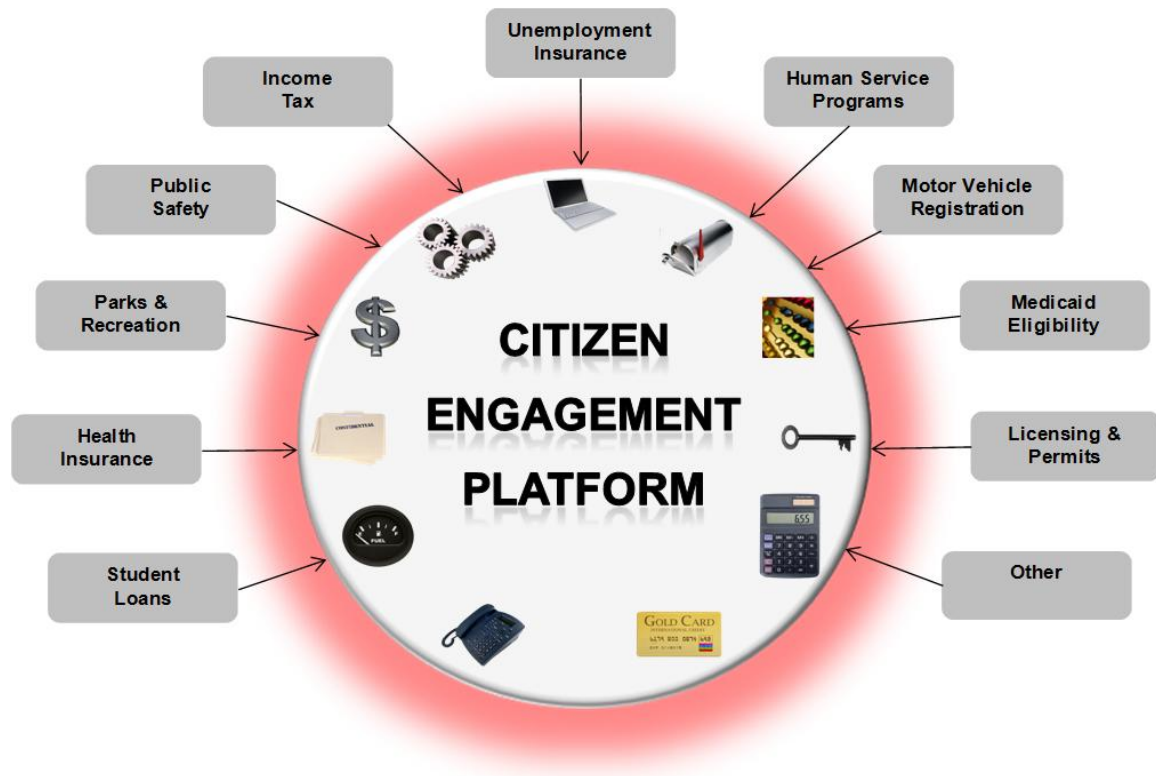
The differences between private and public sector customer relationships are relatively small, but important.

- **Not For Profit:** Governments provide, versus sell, services to citizens. Government does not sell products to a customer, nor does government have a sales cycle, an opportunity or a lead.
- **Mandatory Engagement:** In certain circumstances, citizens are required to work with government. Citizens must pay taxes, purchase automobile insurance, maintain a valid driver's license to drive, etc. Certainly, some services are not mandatory, but the private sector has no equivalent.
- **Non Competitive:** Governments do not compete with each other, so they can share information across agencies, across states, and across governmental entities. A common platform can allow better decision making for government as they can perform analytics and reporting across state boundaries that are unavailable in today's world.



Government needs an innovative and elegant **Citizen Engagement Platform as a Service (CEPaaS)** that includes a marketplace for government solutions. Tomorrow's government platform is predicated on the use of a common Citizen Engagement Platform (as a Service) specifically built for governments to provide holistic, comprehensive customer lifecycle management services. The software community can use this platform to build out agency specific solutions (i.e., Unemployment Insurance) that integrate into the platform seamlessly through standard web-based services.

Citizen Engagement Platform as a Service (CEPaaS)

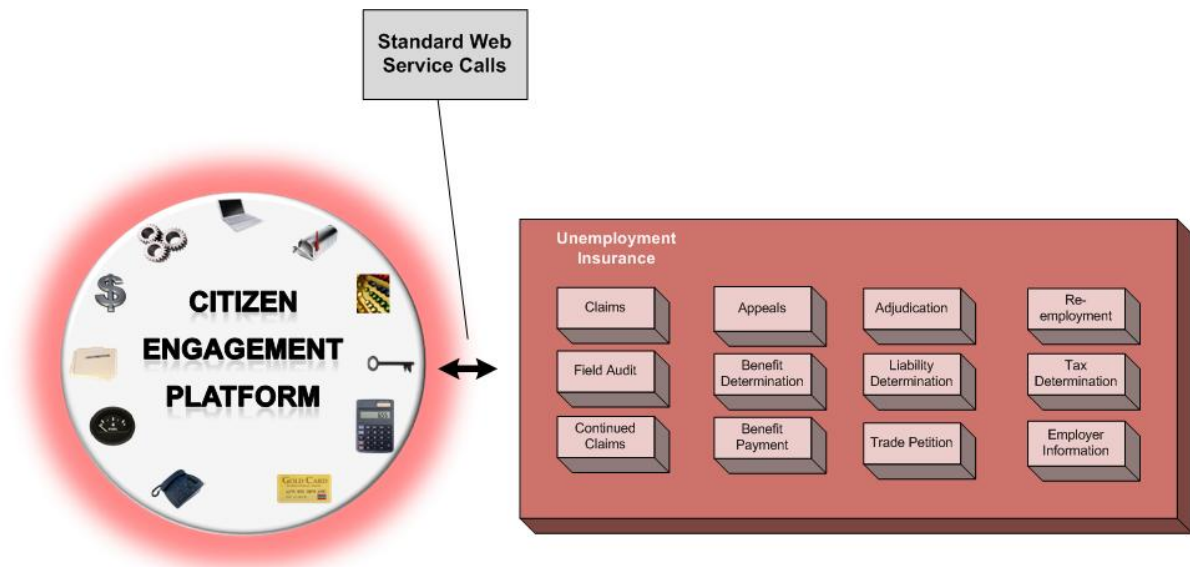


Government needs a platform that provides common functionality across citizens including:

- **Citizen Information:** All the information necessary for a citizen to interact with governmental entities.
- **Citizen Preferences:** A citizen's preference for areas such as correspondence, emergency contact information, standard contact details, etc. Opt out features should always be a choice for a citizen except for mandatory services.
- **Relationships:** Understanding the individual and household relationships of the citizen.
- **Activities:** Tasks, appointments and due dates between government employees and citizens.
- **History:** A history of previous addresses, services obtained and such can help increase citizen engagement and satisfaction during support calls.
- **Analytics:** A standard for analyzing information across the citizen platform will offer unprecedented analysis for government entities. Applying analytics across multiple disciplines and across state and local boundaries can offer government decision-making capabilities impossible in today's world.

- **Intelligent Search:** To find specific information quickly and accurately.
- **Standards:** A standard, open source platform in which systems integrators, software developers and technology companies can build new solutions without having to re-invent the citizen information and allow seamless interoperability across all participating solutions.
- **Secure:** By centralizing on one platform, we are able to identify and better secure citizen data that exist today across multiple agencies.

CEPaaS Marketplace



The surrounding marketplace should provide government with the following:

- **Interoperability:** Applications and solutions built around the platform will immediately be interoperable based on a standards based architecture. The Citizen Engagement Platform will provide interfaces that developers can use to create new government solutions.
- **Innovation:** Software companies that could not engage with government before can easily integrate their solutions within the marketplace. In this way, CEPaaS is also a driver of future economic development.
- **Immediacy:** Unless there is a need for data migration or long contract negotiations, new solutions may be purchased and incorporated into the existing platform within hours, not months or years as is in the current situation.
- **Integration:** The platform will provide some pre-built components that can be shared and leveraged in all applications. In addition, it will provide an open web services API that describes all objects and methods and is available to external applications.

- **Security:** The platform will require all software publishers to pass a security screen before their applications are available on the marketplace.

Examples of marketplace applications are:

- **Social Media:** Interfacing with social media (i.e., Facebook, Twitter) and allowing citizens to engage with each other.
- **Mobility:** Ability to provide services anytime, anywhere, to any device.
- **Marketing:** Surveys, polling, newsletters, RSS feeds, to name just a few. Many of these solutions already exist, but are unable to operate within government boundaries.
- **Collaboration:** Allowing agencies and citizens alike to collaborate together.
- **Enterprise Services:** Any service that needs to be performed using citizen information could become an enterprise service and used throughout any government organization. This could include emergency services, as well as other informational services not available today.
- **Customer Service and Support:** Integrating these solutions across agencies and providing a 360 view of the citizen will become invaluable to assist supporting citizens and help government agencies ensure the most effective and efficient use of their services.
- **New Products and Services:** Imagine the possibilities.
- **Agency Specific:** Building specifically designed services (i.e., Unemployment Insurance, Medicaid Systems) that integrate with the Citizen Engagement Platform.

Achieving the Solution

A technology innovation such as CEPaaS will transform governments across the United States and beyond. The cost savings in hardware and software alone reside in the hundreds of millions of dollars, if not billions. But, the solution requires a private/public partnership with leadership, expertise, innovation and collaboration across the technology industry and all levels of government. Application vendors can build specific capabilities on top of the platform for various services and products, while the Citizen Engagement Platform will likely require collaboration within many facets of the technology industry, including software and hardware vendors.

Government should run effectively, efficiently and elegantly, just as many private sector companies do. Decreasing costs while increasing citizen satisfaction is a win-win for any business, but is truly transformative for government. A public/private collaboration for CEPaaS is a response to growing citizen concerns around government spending and waste, while offering citizens a way to positively and proactively interact with government entities. And that makes sense for us all.

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