

**A RESOLUTION  
BY FINANCE/EXECUTIVE COMMITTEE**

**13- R-0447**

**A RESOLUTION TO AMEND RESOLUTION 12-R-1741, WHICH AUTHORIZED THE CITY OF ATLANTA TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER FC-6381, WITH OPUS GROUP, LLC, FOR THE ATL311 CALL CENTER PROJECT IMPLEMENTATION, UTILIZING THE PRINCE GEORGE'S COUNTY, MARYLAND INFORMATION TECHNOLOGY CONSULTING AND TECHNICAL SERVICES CONTRACT NUMBER S11-115, TO PROVIDE FOR A CONTRACT TERM OF TWO (2) YEARS; AND FOR OTHER PURPOSES.**

**WHEREAS**, Resolution 12-R-1741 was adopted by the Atlanta City Council on December 3, 2012 and approved as per City Charter Section 2-403 on December 12, 2012 authorizing the City of Atlanta to enter into Cooperative Purchasing Agreement Number FC-6381 for the ATL311 Call Center Project Implementation; and

**WHEREAS** the Cooperative Purchasing Agreement Number FC-6381 includes a provision requiring completion of the scope of work over a period of two (2) years; and

**WHEREAS**, through inadvertence Resolution 12-R-174, as adopted, did not reflect an enabling provision to authorize the contract for a two (2) year term; and

**WHEREAS**, it is necessary to amend Resolution 12-R-1741 to clarify that the term of Cooperative Purchasing Agreement Number FC-6381 shall be for a period of two (2) years from the date of execution of the agreement, with all other terms and conditions to remain the same; and

**WHEREAS**, the Chief Procurement Officer and the Chief Information Officer recommend the approval of the above-described amendment.

**NOW, THEREFORE BE IT RESOLVED BY THE COUNCIL OF THE CITY OF ATLANTA, GEORGIA**, that Resolution 12-R-1741, adopted by the Atlanta City Council on December 3, 2012 and approved as per City Charter Section 2-403 on December 12, 2012, is hereby amended so as to authorize a contract term of two (2) years for Cooperative Purchasing Agreement number FC-6381 for the ATL311 Call Center Project Implementation, with all other terms and conditions to remain the same.

**BE IT FURTHER RESOLVED**, that the Chief Procurement Officer in consultation with the City Attorney is directed to prepare any documents in addition to the previously authorized agreement for execution by the Mayor or his designee.

**BE IT FURTHER RESOLVED**, that the agreement will not become binding on the City, and the City will incur no obligation or liability under it until it has been executed by the Mayor or his designee, attested to by the Municipal Clerk, approved as to form by the City Attorney or her designee, and delivered to Opus Group, LLC.

**BE IT FINALLY RESOLVED**, that all parts of resolutions in conflict herewith are hereby rescinded.

**Part II: Legislative White Paper:**

(This portion of the Legislative Request Form will be shared with City Council members and staff)

**A. Committee of Purview: FINANCE/EXECUTIVE**

**Caption:**

**A RESOLUTION  
BY FINANCE/EXECUTIVE COMMITTEE**

**A RESOLUTION TO AMEND RESOLUTION 12-R-1741, WHICH AUTHORIZED THE CITY OF ATLANTA TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER FC-6381, WITH OPUS GROUP, LLC, FOR THE ATL311 CALL CENTER PROJECT IMPLEMENTATION, UTILIZING THE PRINCE GEORGE'S COUNTY, MARYLAND INFORMATION TECHNOLOGY CONSULTING AND TECHNICAL SERVICES CONTRACT NUMBER S11-115, TO PROVIDE FOR A CONTRACT TERM OF TWO (2) YEARS; AND FOR OTHER PURPOSES.**

**Council Meeting Date: Monday, March 4, 2013**

**Requesting Dept: Information Technology**

**B. To be completed by the department:**

**1. Please provide a summary of the purpose of this legislation (Justification Statement).**

DIT would like Council to authorize the amendment of Resolution 12-R-1741 (adopted by the Atlanta City Council on December 3, 2012 and approved as per City Charter Section 2-403 on December 12, 2012), so as to authorize a contract term of two (2) years for Cooperative Purchasing Agreement number FC-6381 for the ATL311 Call Center Project Implementation, with all other terms and conditions to remain the same.

**2. Please provide background information regarding this legislation.**

**Issue**

Through inadvertence, Resolution 12-R-174, as adopted, did not reflect an enabling provision to authorize the contract for a two (2) year term.

**Recommendation**

The Chief Information Officer and the Chief Procurement Officer recommend the amendment of Resolution 12-R-1741 so as to authorize a contract term of two (2) years for Cooperative Purchasing Agreement number FC-6381 for the ATL311 Call Center Project Implementation, with all other terms and conditions to remain the same.

**3. If Applicable/Known:**

**(a) Contract Type (e.g. Professional Services, Construction Agreement, etc):**  
Implementation & consulting services.

**(b) Source Selection:**

**(c) Bids/Proposals Due:**

**(d) Invitations Issued:**

**(e) Number of Bids:**

**(f) Proposals Received:**

**(g) Bidders/Proponents:**

**(h) Term of Contract:** Two (2) years.

**4. Fund Account:** N/A

**5. Source of Funds:** N/A.

**6. Fiscal Impact:** N/A.

**7. Method of Cost Recovery:**

**This Legislative Request Form Was Prepared By:** Kieva Morrison, DIT Legislative Analyst.

#18

(Do Not Write Above This Line)  
**12-R-17741**

A RESOLUTION BY COUNCILMEMBER HOWARD SHOOK

A RESOLUTION AUTHORIZING THE MAYOR OR HIS DESIGNEE TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER COA-6340-PL PURSUANT TO SECTION 2-1601 ET SEQ. OF THE CITY OF ATLANTA CODE OF ORDINANCES, UTILIZING GENERAL SERVICES ADMINISTRATION CONTRACT NUMBER GS-35F-0516U WITH OPUS GROUP, LLC, FOR THE PURCHASE OF ORACLE SIEBEL PUBLIC SECTOR CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE IMPLEMENTATION, MAINTENANCE, AND SUPPORT SERVICES NECESSARY FOR THE 311 CALL CENTER PROJECT, ON BEHALF OF THE DEPARTMENT OF INFORMATION TECHNOLOGY, IN AN AMOUNT NOT TO EXCEED ONE MILLION, NINE HUNDRED FORTY-FOUR THOUSAND, ONE HUNDRED FIFTY DOLLARS AND NO CENTS (\$1,944,150.00); ALL CONTRACTED WORK SHALL BE CHARGED TO AND PAID FROM FUNDING NUMBERS LISTED HEREIN; AND FOR OTHER PURPOSES.

- CONSENT REFER
- REGULAR REPORT REFER
- ADVERTISE & REFER
- 1<sup>ST</sup> ADOPT 2<sup>ND</sup> READ & REFER
- PERSONAL PAPER REFER

Date Referred: 11/19/12  
 Referred To: Finance Dept  
 Date Referred: \_\_\_\_\_  
 Referred To: \_\_\_\_\_  
 Date Referred: \_\_\_\_\_  
 Referred To: \_\_\_\_\_

**ADOPTED BY**

**COUNCIL**

DEC 03 2012

Committee \_\_\_\_\_  
 Date \_\_\_\_\_  
 Chair \_\_\_\_\_  
 Referred To \_\_\_\_\_

*Fin. Executive*

*11-28-12*

*Delia N. Moore*

*Dr. Sublette M. Giv*

*Howard Shook*

*Howard Shook*

Refer To \_\_\_\_\_

Committee \_\_\_\_\_  
 Date \_\_\_\_\_  
 Chair \_\_\_\_\_  
 Referred To \_\_\_\_\_

Committee

Date

Chair

Action Fav, Adv, Hold (see rev. side)

Other

Members

Refer To \_\_\_\_\_

Committee

Date

Chair

Action Fav, Adv, Hold (see rev. side)

Other

Members

Refer To \_\_\_\_\_

FINAL COUNCIL ACTION  
 2<sup>nd</sup>  1<sup>st</sup> & 2<sup>nd</sup>  3<sup>rd</sup>  
 Readings  
 Consent  V Vote  RC Vote

**CERTIFIED**  
 DEC 03 2012  
 ATLANTA CITY COUNCIL PRESIDENT

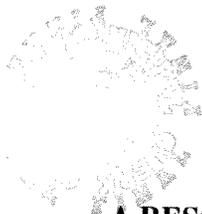
**CERTIFIED**  
 DEC 03 2012  
 Municipal Clerk

MAYOR'S ACTION

**APPROVED**

DEC 12 2012

WITHOUT SIGNATURE BY OPERATION OF LAW



**A RESOLUTION BY COUNCILMEMBER HOWARD SHOOK**

**AS SUBSTITUTED BY FINANCE/EXECUTIVE COMMITTEE**

**A RESOLUTION AUTHORIZING THE MAYOR OR HIS DESIGNEE TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER FC-6381, ATL 311 SOLUTION IMPLEMENTATION, PURSUANT TO SECTION 2-1601 ET SEQ. OF THE CITY OF ATLANTA CODE OF ORDINANCES, UTILIZING PRINCE GEORGE'S COUNTY, MARYLAND'S INFORMATION TECHNOLOGY CONSULTING AND TECHNICAL SERVICES CONTRACT NUMBER S11-115 WITH OPUS GROUP, LLC, FOR THE PURCHASE OF ORACLE SIEBEL PUBLIC SECTOR CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE IMPLEMENTATION, MAINTENANCE, AND SUPPORT SERVICES NECESSARY FOR THE 311 CALL CENTER PROJECT, ON BEHALF OF THE DEPARTMENT OF INFORMATION TECHNOLOGY, IN AN AMOUNT NOT TO EXCEED ONE MILLION, EIGHT HUNDRED SIXTY THOUSAND, TWO HUNDRED FIFTEEN DOLLARS AND FIVE CENTS (\$1,860,215.05); ALL CONTRACTED WORK SHALL BE CHARGED TO AND PAID FROM FUNDING NUMBERS LISTED HEREIN; AND FOR OTHER PURPOSES.**

**WHEREAS**, the City of Atlanta ("City") desires to implement a 311 Call Center that will improve City customer service by providing general information and managing customer service requests from Atlanta's residents and visitors; and

**WHEREAS**, the Oracle Siebel Public Sector customer relationship management ("CRM") software implementation, integration, maintenance, and support services provided by Opus Group, LLC are necessary to complete Phase 1 of the 311 Call Center initiative; and

**WHEREAS**, pursuant to Article X, Division 15 Intergovernmental Relations of the City of Atlanta Code of Ordinances (the "Code"), the Chief Procurement Officer may procure supplies, services or construction items through contracts established by a public procurement unit outside the City; and

**WHEREAS**, the Chief Information Officer has identified Prince George's County, Maryland's Information Technology Consulting and Technical Services Contract Number S11-115 with OPUS Group, LLC, as a source for a cooperative purchase necessary for the 311 Call Center project; and

**WHEREAS**, the Chief Procurement Officer has evaluated and determined that competitive procedures akin to those used by the city were used by Prince George's County, Maryland in the development of the contract from which the cooperative purchasing agreement was derived and that the cost of the goods, supplies, services or construction are comparable to or less than the cost of the same goods, supplies, services or construction if obtained through city procurements under Division 4 of the City Procurement Code; and



**WHEREAS**, the Chief Information Officer and the Chief Procurement Officer recommend the execution of cooperative purchasing agreement number FC-6381, ATL311 Solution Implementation, with OPUS Group, LLC, utilizing Prince George's County, Maryland's Information Technology Consulting and Technical Services Contract Number S11-115, to purchase Oracle implementation, maintenance, and support services necessary for the 311 Call Center project in an amount not to exceed One Million, Eight Hundred Sixty Thousand, Two Hundred Fifteen Dollars and Five Cents (\$1,860,215.05); all contracted work shall be charged to and paid from Project, Award, Task, Expenditure Type, and Organization ("PTAEO") numbers listed below.

**NOW, THEREFORE BE IT RESOLVED BY THE COUNCIL OF THE CITY OF ATLANTA, GEORGIA**, that the Mayor or his designee is authorized to execute, on behalf of the City of Atlanta, cooperative purchasing agreement number FC-6381, ATL311 Solution Implementation with OPUS Group, LLC, Prince George's County, Maryland's Information Technology Consulting and Technical Services Contract Number S11-115, to purchase Oracle Siebel Public Sector CRM software implementation, maintenance, and support services necessary for the 311 Call Center project in an amount not to exceed One Million, Eight Hundred Sixty Thousand, Two Hundred Fifteen Dollars and Five Cents (\$1,860,215.05).

**BE IT FURTHER RESOLVED**, that all contracted work shall be charged to and paid from PTAEO Project and Grants ("PnG"): Project Number 05111397 (311 Call Center).

**BE IT FURTHER RESOLVED**, that the Chief Procurement Officer in consultation with the City Attorney is directed to prepare an agreement for execution by the Mayor or his designee.

**BE IT FINALLY RESOLVED**, that the agreement will not become binding on the City, and the City will incur no obligation or liability under it until it has been executed by the Mayor or his designee, attested to by the Municipal Clerk, approved as to form by the City Attorney or her designee, and delivered to OPUS Group, LLC.

A true copy,

*Rhonda Daughin Johnson*  
Municipal Clerk

ADOPTED by the Atlanta City Council  
APPROVED as per City Charter Section 2-403

DEC 03, 2012  
DEC 12, 2012

RCS# 2461  
12/03/12  
3:28 PM

Atlanta City Council

12-R-1741

COOP AGRMNT FC-6381; ATL 311 SOLUTION  
IMPLEMENTATION AND MANAGEMENT  
ADOPT ON SUB

YEAS: 13  
NAYS: 1  
ABSTENTIONS: 0  
NOT VOTING: 1  
EXCUSED: 0  
ABSENT 1

Y Smith	Y Archibong	Y Moore	Y Bond
Y Hall	Y Wan	Y Martin	Y Watson
B Young	Y Shook	Y Bottoms	Y Willis
Y Winslow	N Adrean	Y Sheperd	NV Mitchell

12-R-1741

City of Atlanta (CoA) seeks an enterprise CRM expert to implement the City's enterprise ATL311 solution. CoA has selected Siebel Public Sector 8.2 as the COTS solution for the ATL311 initiative. COA seeks a highly skill and experienced Siebel Solution Architect to implement the proposed future ATL311 solution and lead a Technical Team.

### **Project Goals**

1. Provide significantly enhanced service delivery and allow City Government the ability to capture customer "wants and needs", then analyze that information to the benefit of the customer and the Government as a whole.
  - a. Deliver consistent and accurate information for all City services;
  - b. Reduce the "points-of-contact" for non-emergency information and service;
  - c. Reduce call volume and resource requirements for the 9-1-1 emergency response service;
  - d. Eliminate multiple and/or redundant, automated information systems; and
  - e. Provide the public and management service request tracking information, from intake through disposition
2. Provide management and employees the tools, information systems and data necessary to ensure timely and satisfactory disposition of customers' requests.
3. Establish the Innovation Delivery Team to improve customer service.
  - a. Develop a "one-stop" phone number for all government non-emergency: information and referral, requests for service, and status requests;
    - i. Develop a "closed-loop" system to confirm receipt of request as well as confirmation of service completed;
  - b. Enhance self service through a user-friendly web site, IVR and Mobile & SmartApps;
  - c. Launch an effective community outreach program;
    - i. Solution a "post service" forum to measure satisfaction with services; and
  - d. Implement GIS technology to enhance program responsiveness.
4. Provide management the information needed to proactively make program resource allocation and operational decisions.

### **Scope of Work**

The Contractor will be responsible to the ATL311 Project Lead for the oversight of activities required to organize and accomplish the following tasks and project goals:

#### ***Solution Development & Consultation***

1. Identify and recommend: policies, best practices and processes, systems, information management, and technology necessary to improve the provision of government services to customers;
2. Initiate efforts necessary to communicate the City's CRM philosophy and direction to decision makers and managers across all City Departments to build consensus for adopting and implementing the CRM Strategic Plan and future solution state
3. Assist with the business process analysis and re-engineering efforts and transition strategy for the future state;
4. Coordinate the ATL311 Technical Staff Development in conjunction with the Department of Information Technology (DIT);
5. Coordinate and resolve compatibility issues with the City's Enterprise Resource Planning (ERP) project and architecture;
6. Provide project status tracking and reporting following the project management methodologies and standards pertaining to Siebel implementation best practices;
7. Provide updates and briefings to the Project Lead and Project Team;

8. Support the implementation process by acting as a bridge between the business and technical requirement gathering efforts for the Siebel solution;
9. Map the relationship between existing future state functions and Siebel functions;
10. Identify the relationship between CoA changing business models and Siebel functions;
11. Align the future state ATL311 reporting requirements and Siebel reporting functions;
12. Coordinate the design of the user interface and software workflows forming the foundation for the implementation project;
13. Develop a proposed solution for each identified requirement and evaluate gap complexity & development type (i.e. out-of-box, configuration, custom development) between the business requirements and the Siebel functionality;
14. Develop cloud-based solution with the monitoring, maintaining, and planning for all application requirements and solicit new technical requirements to close gaps and authors technical solutions to close gaps.
15. Analyze and document architectural requirements, and evaluate proposed business solutions for impact analysis;
16. Develop solutions for technical requirements such as eSmartscripts, CTI, workflows, PDF documents, etc.
17. Assist with the assessment of interface complexity and development of a comprehensive application integration strategy;
18. Identify and develop interfaces needed to support the “closed-loop” implementation of the ATL311 solution, including CTI, GIS, Hansen and Accela;
19. Assist the project engagement by addressing the database strategy, repository strategy, network strategy, server strategy, client deployment, and topology; and
20. Select Technical Team.

#### ***Requirements***

- Siebel 8 “Consultant” Certification or greater and/or necessary expertise and experience;
- Eight (8) or more years of Siebel consulting experience, of which 12 months must be with the Siebel Public Sector product line using Knowledge base, Solutions, Analytics, and Case Management modules;
- Demonstrated Siebel Application, Technical, & Integration experience;
- Demonstrated experience with Siebel modules: Service requests, Case Management, Call Center, eService, & eSmartscripts

#### ***Deliverables***

The ATL311 Project Team requires a full-time Siebel Solution Architect to lead and focuses his/her efforts maximizing the Siebel COTS solution for the ATL311 initiative. Coordination of resources and issues and between existing systems and new solutions and applications is within the scope of this SOW.

The Contractor, in close collaboration with the Project Team, must create, maintain and deliver the following:

1. Siebel Functional Gap Analysis (updates and final)
2. Siebel Solution Scope (updates and final)
3. Siebel Solutions Blueprint (updates and final)
4. Task Status Report (weekly)

#### ***Duration***

- 24 months, two years



Orchestrate  
Simplify

**OPUS GROUP, LLC**

**CITY OF ATLANTA**

**ATL311 SOLUTION  
IMPLEMENTATION**

**Final ROUGH ORDER OF  
MAGNITUDE (ROM)**

**NOVEMBER 16, 2012**

**MARK D. DAMJAN**

**MANAGING MEMBER**

**PHONE: (800) 287-6787 EXT. 708**

**MARK.DAMJAN@OPUSGROUPLLC.COM**

**NOTICES:**

**The contents of this document are confidential and proprietary to  
Opus Group, LLC  
This information may be used by the City of Atlanta  
solely for evaluation of this offer..**

The intent of this document is to provide you with a statement of the services currently being discussed with Opus Group, LLC. Opus Group cannot guarantee that its position with regard to the services discussed herein will not change in the future and this document does not bind Opus Group to any particular course in terms of its services or products. The final services agreement when mutually executed by and between Opus Group and the City of Atlanta will solely govern the services to be provided by Opus Group. Any additional terms or commitments written or oral will not apply.

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# Executive Summary

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## INTRODUCTION

Opus Group, LLC (Opus Group) appreciates the opportunity to assist the City of Atlanta (CoA) with the planned implementation of the City's enterprise ATL311 solution.

Based largely on the knowledge gathered from discussions between the City and Opus Group, this proposal contains our understanding of your near-term needs, the recommended approach, and an estimate for the effort required. Following the City of Atlanta's approval and concurrence, we can proceed very quickly to staff and initiate the project.

Opus Group proposes to assist the City in the configuration and deployment of Opus Group's Siebel applications in a phased project approach. The City would like Opus Group, as necessary, to function as the integrator which may include services such as project management, business requirements analysis and product and implementation expertise.

The recommendations contained herein are based upon the following:

- ◆ Opus Group' initial high-level discussions with the City
- ◆ Opus Group' experience in implementing Oracle Siebel applications
- ◆ A high incidence of “fit” between the Opus Group application and the City's required functionality.

# Atlanta's Challenges and Objectives

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## ATLANTA'S CHALLENGES

As with every major city during this time, budget conditions are changing and challenging the City of Atlanta to meet the needs of its residents. The most important changes to the City are the shrinking budgets, reduced staff, and growing demand for City services. Given these pressures, the new business objective must be to build solutions that allow the City to maintain its large constituent service base, while optimizing service request intake and service delivery.

## CITY GOALS

As stated by the City, the high-level goals of the ATL311 project—which can be used to measure project success—are the following:

- ◆ Provide significantly enhanced service delivery and allow City Government the ability to capture customer “wants and needs”, then analyze that information to the benefit of the customer and the Government as a whole.
- ◆ Provide management and employees the tools, information systems and data necessary to ensure timely and satisfactory disposition of customers’ requests.
- ◆ Establish the Innovation Delivery Team to improve customer service.
- ◆ Provide management the information needed to proactively make program resource allocation and operational decisions.

## MEETING THE GOALS

Opus Group recommends that these challenges be approached in a methodical way. It is difficult to effectively address every issue at once and succeed in achieving all user management expectations. Therefore, the initial focus for the City should be in three areas.

- ◆ Reducing the number of information silos
- ◆ Creating a unified Customer View
- ◆ Adopting standard methodologies, such as for account management, opportunity management, channel management, etc.

By addressing these initiatives a framework will be established which starts to address the primary objectives of the City’s and can be leveraged for future enhancements to the on-going solution.

## Reducing Information Silos

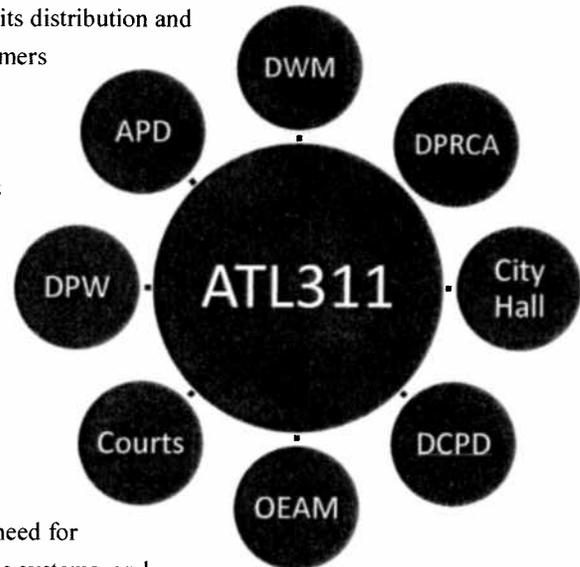
The City of Atlanta's current environment is supporting a multitude of customer information systems. Accordingly, customer information is fragmented across departments, lines of business, divisions, channels, product lines, or some other unit. The result is a "silo" effect where there is no consolidated and unified view of the customer. This leads to a fragmented customer experience. Additionally, building and maintaining large number of systems create inefficiencies. A key objective of the City's vision is to **remove information silos**, and make better use of resources, by merging or interfacing multiple systems into a central system.



## Creating a Unified Customer View

A unified view of the customer will assist in improving the City Of Atlanta's ability to understand, classify, segment, communicate with and deliver benefits to its customers. This is the kind of vital data that makes a difference to customers and makes the field more aware of potentially critical situations. As the City expands its distribution and communication channels, customers will be forced to move between channels.

A single database of record lays the foundation for integrated, yet dynamic, web, phone, and e-mail communications. This can help the City better understand and manage their customer and partner relationships. Plus, this can improve the accuracy and consistency of data, reduce the need for data to be replicated to numerous systems, and better ensure a consistent customer experience across all channels.



Such an understanding of the customer may improve the field's efficiency and productivity and allow more time to identify new opportunities, offer better services, improve customer satisfaction and reduce costs.

### **Adopting Standard Methodologies**

A large hindrance to superior performance is having different methodologies for essential business processes. This can cause problems and inefficiencies because processes cannot share information effectively, best practices are less likely to be identified or implemented, disparate information silos are created, and overall employee and customer satisfaction can be negatively impacted. But an integrated, consistent methodology could enable the City to streamline operations, enhance employee skill sets and effectiveness, and strengthen customer service.

## **MEASURING SUCCESS**

The City of Atlanta requires a comprehensive system to support the above needs for both existing lines of business as well as future growth plans. Growth will come from a variety of areas: number of users, geography, new products and services. As the processes and systems are implemented, results should be measured to ensure success. A few of the key measures that will indicate progress include:

- ◆ Improved Service to the Public
  - Provide a single, three-digit number, point-of-contact to the general public for all the information and Government services channels.
  - Eliminate the need for citizens to understand Government organization.
  - Minimize call referrals and transfers.
  - Provide service request tracking and traceability.
- ◆ Increased Accountability
  - Provide data and information essential for both the Executive and Council to make improved budgetary and resource allocation and reallocation decisions.
  - Allow individual requests to gain senior management level visibility.
  - Create a mechanism for Departmental integration.
  - Tracking individual requests for service that are of interest to Executives and Council Members for personal follow-up.
- ◆ Cost Savings
  - Consolidation of people, processes, and technologies;
  - Reduced cost per call: consolidate multiple intake call centers to a single entity; realign & standardize intake functions to “Generalist”

positions; and direct intake transaction to least costly channels (i.e. self-service, internet portal, mobile apps)

- Consolidate technology base to a single platform for hardware, software, and O&M savings.

The over-arching challenge for the City of Atlanta will be the integration of people, process and technology. This is true based on the fact that the City has several solutions in place throughout different departments and is encountering tremendous competition for supporting resources. Our proposal will provide a plan to address these concerns with a solution of services and approaches that will build a global, scalable and maintainable CRM solution.

# The Solution

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## SOLUTION MODULES

The following table lists the modules Opus Group will work on and the estimated amount of configuration necessary to achieve the ATL311 solution objectives.

### Siebel Modules

- Siebel Public Sector Base
  - Contacts, Accounts, Service Requests, Cases, Field Service Activities/(Activity Plans), Calendar, Solutions Attachments, and Correspondence/Outbound eMail
- Siebel SmartScripts
- Siebel Outbound Email Templates
- Workflows:
  - Assignment manager
  - Data Migration

### Business Intelligence/Reports/Dashboards

- OBIEE: BI Publisher Reports
- Dashboards Answers

### Service Analytics

- Data Source – Siebel Public sector/311 (only)
- Custom Schema Extensions. A single instance of Siebel OLTP as Data Source
- ETL Jobs from 311/CRM Base transactional DB to Service Analytics DW only.

### Professional Services/Training

- Implementation of standard Siebel and Opus 311 functionality
  - Enhanced Service Request Management: General Information, Request for Service, Referral, Comments
  - 311 Solutions: Solution administration as Knowledge Base
  - Outbound Email Templates :
  - Tax Property Asset Management (Master Data Management)
- Database Sizing Reviews

### GIS Integration

- GIS interface for Polyogn Data and Map\* (Customer Provided GIS): Interface with customer ARCGIS with following features: Location Verification Request/Receive GIS Point Polygons/Data Layers

### Maps Integration

- Google/Bing Map interface: Web URL Interface for location mapping & real time interface to web mapping application using address or Lat. Long. Coordinate

### Self-Service

- Web Portal: Constituent Self Service Portal with following features:
  - Knowledge Base Search
  - Service Request Submission
  - Service Request Status
- Mobile Phone App- Mobile service request application with geo-code capability

## GETTING STARTED

### ePlan

Opus Group's ePlan methodology efficiently maps customer business requirements to the CRM solution functions and creates an overall implementation strategy that facilitates on-time delivery of any Siebel implementation. It also ensures that "out-of-the-box" Siebel functionality is maximized and implemented correctly, enabling implementation teams to achieve high customer satisfaction.

ePlan develops the blueprint to implement the City's vision and strategy. The ePlan delivers the following benefits:

- ◆ Enables the key project stakeholders to ensure that the proposed solution is clearly aligned with the City's business objectives.
- ◆ Prioritizes requirements in line with business objectives, thus maximizing the ROI on a Siebel implementation.
- ◆ Generates commitment from key stakeholders and the user community.
- ◆ Minimizes risk by optimizing Siebel out-of-the-box functionality, minimizing customization, and identifying unneeded customizations.
- ◆ Provide a foundation for business design of future phases.

### Solution Blueprint Stage

The first step in the ePlan progression is to conduct Business Workshops where the business requirements are gathered for every activity within each Business Process. The process begins with ePlan utilizes Siebel Business Models that have been pre-mapped to Siebel functionality as well as a Requirements Management toolkit to create the end goal of a Strategic Phased Implementation Plan. The Siebel Business Models are used to facilitate these workshops and thus promotes use of "standard" Siebel functionality.

The key activities in the Solution Blueprint stage include:

- ◆ A set of 2-3 hour workshops that document customer requirements, agree upon future customer business processes, map customer requirement to Siebel functionality and identify solutions for requirements that are not met by Siebel out-of-the-box functionality.
- ◆ Technical requirements workshops to create a proposed technical architecture and integration strategy.

The key deliverables from this stage include:

- ◆ Solution Blueprint: Identifies the proposed business and Siebel solution as well as the integration strategy to satisfy all the business requirements. These solutions will include use Siebel out-of-the-box functionality; Siebel

configured solutions and solutions utilizing existing systems and manual operations.

### Strategy eRoadmap Stage

This stage seeks to maximize customer ROI by developing a clear, overarching map of Siebel functionality as they match the customer business requirements, or functions that need to be configured or scripted, a phased plan for implementing these functions, estimates of cost and level of effort for each project phase, and a high level technology plan.

The key activities in the Solution Blueprint stage include:

- ◆ Transferring the relationships between Business Requirements, Siebel functionality, and Siebel processes are into the ePlan's Requirement Management toolkit. This toolkit allows these relationships, along with other data, such as the organizational structure, channels, products, and business objectives, to be analyzed to create an optimal implementation strategy.

The key deliverables from this stage include:

- ◆ The Strategy Roadmap includes a phased implementation plan that outline the business functionality by phases, as well as a plan for rolling out each phase to different divisions and channels within the organization. Each phase also outlines a level of effort and estimated cost by phase.
- ◆ The strategic baseline created is then used to guide the analysis and implementation of the subsequent eRoadmap phases.
- ◆ An executive presentation of the Solution Blueprint and the Roadmap Strategy.

## IMPLEMENTING ATL311

Opus Group leverages Siebel's *eRoadmap* implementation methodology. The eRoadmap methodology—a Project Management Institute (PMI) PMBOK compliant, accelerated project implementation methodology—focuses on the key strategic and tactical areas that must be addressed to maximize the City's return on investment while minimizing their business risk to ensure successful completion of a project. The *eRoadmap* is comprised of activities logically grouped into six distinct stages to assure proper project management and control techniques during the life cycle of a project. However, the stages are iterative in nature, enabling the City to quickly realize the benefits of its new CRM solution.

Not all projects or professional service engagements will always use all stages and complete all the activities outlined in this document. Therefore, this staged approach has been designed to be flexible enough to allow specific requirements to be properly addressed and for methods and techniques to be selected as needed.

Each *eRoadmap* stage has been carefully defined with predefined inputs and activities designed to produce the desired output. A formal review process is used throughout the methodology to ensure project quality.

Although the Opus Group methodology is primarily focused on providing guidance to implement Siebel functionality, project management best practices are also clearly defined. These activities include risk avoidance, task and time management, quality management, status reporting, milestone management and scope change management. Issue and problem resolutions are carried out on an on-going basis throughout the project lifecycle.

### **Define Stage**

During this initial phase, all project stakeholders are identified and the roles and responsibilities of Opus Group staff and the City's project managers are communicated to them. The project control structure needed to manage the project is defined, all required project planning documents are created, and the City's business problem: including the metrics to be used to measure project success: are validated.

Opus Group staff and the City's project managers, referred to collectively as the Project Management Team, jointly will conduct planning activities such as:

- ◆ Project Planning and Startup: Includes creating living documents such as the work breakdown structure, project management and change scope control plan, and the risk assessment and mitigation plan. They will also conduct a team kickoff meeting.
- ◆ Project Control and Reporting: Includes establishing issue and risk tracking procedures and status reporting mechanisms.
- ◆ Project Quality Planning: Includes planning for design and configuration reviews, team walkthroughs, scheduled project quality reviews, and periodic project audits.

The Business Analysis Team will be responsible for defining high-level business parameters such as:

- ◆ Refining Business Objectives: To ensure that the project stays focused on solving business goals.
- ◆ Refining High-level Functional Scope: To verify the scope of the project versus subsequent implementation phases.

Core members of the Systems & Data Integration Team will be responsible for defining high-level technical parameters such as:

- ◆ Refining System Integration Scope: Includes defining the types and approach for integration with external and legacy systems.

- ◆ Refining Data Migration Scope: Includes defining the data sets and anticipated data volumes for the initial data migration into Siebel.

The key deliverables from the Define stage may include:

- ◆ High-level Business Objectives
- ◆ High-level Scope Definition
- ◆ Initial Project Plan
- ◆ Project Team Training Plan
- ◆ Risk Assessment

### **Discover Stage**

The Integrated Project Team, consisting of resources from Opus Group and the City, working under the direction of the Project Management Team, will identify and document the issues that must be understood before starting the design phase of the client solution. These include:

- ◆ Refining and documenting the City's functional, technical, data, capacity, architecture, performance, and training requirements.
- ◆ Researching and documenting the business process flows that the City needs once the Siebel application is in place. This will cover applications, reporting, workflow, organizational structures and their visibility requirements, and localization.
- ◆ Completing a Gap Analysis to determine the differences between the City's requirements and standard features of the relevant applications.
- ◆ Setting up the development environment that includes installing all server, client, and network hardware and software, and building the required databases.
- ◆ Determine the criteria by which the user acceptance test will be formulated and judged.
- ◆ Pinpointing custom functionality and interfaces to external systems. Identify Conversion/Interface Requirements, data, security , System Capacity and Architecture Requirements

The key deliverables from the Design stage may include:

- ◆ Refined Business Objectives
- ◆ City process scenarios
- ◆ Functional Gap Analysis
- ◆ Sizing Plan and Environmental Management Strategy

- ◆ Software development environment
- ◆ Detailed Project Plan
- ◆ Documented Interface, Data, and Architecture Requirements
- ◆ Refined Risk Assessment

### **Design Stage**

The main objectives are to design a solution that will best meet the City of Atlanta's identified business requirements and to prepare for training and system tests.

Some of the activities that will be completed in this phase include:

- ◆ **Application Design Specification:** Developed to show how the City's requirements would be fully implemented. Areas to be covered include data models, screen definitions, business rules, reports, external interfaces, and custom software development.
- ◆ **Data Conversion Design:** Document the means by which legacy data will be migrated into the Siebel environment.
- ◆ **Unit and Integrated Test Plans:** Developed to show how the solution will be unit tested in a stand-alone mode, and again when it is integrated with other systems or applications. At a minimum, these plans address functional testing, performance testing, and regression testing.
- ◆ **Client Acceptance Test Plan:** Developed to identify the tests that must be run, and the test criteria that must be successfully met, before the City will agree that the system meets the agreed upon specifications. It is based on the criteria defined in the System Requirements.
- ◆ **Design Review:** Developed to analyze the application architecture and design to ensure that all Opus Group' best practices have been followed in designing the City's application.

The objectives of this stage may include:

- ◆ Design a marketing solution that will best meet the City's prioritized business requirements and phased objectives.
- ◆ Quick start focuses on minimal configuration.
- ◆ Prepare for system and user acceptance tests.

### **Configure Stage**

Opus Group will configure the application, develop any required extensions or external interfaces, and prepare the City's organization for the deployment and

ongoing support of the Siebel solution. To meet these objectives, some of the activities the project team will undertake include:

- ◆ Fully configuring Siebel software to meet the City's specifications.
- ◆ Hold a Configuration Review to ensure that Opus Group' best practices have been followed in configuring the application for the City.
- ◆ Generating an End User Training curriculum that identifies the formal and informal training that needs to be provided to bring the City's various functional organizations to the desired proficiency levels.
- ◆ Assembling a comprehensive Test Environment to ensure that test hardware is installed, software is loaded, and databases are built.
- ◆ Project Execution Review: Provides the project manager with performance feedback and allows for consultative assistance with any corrective actions that need to be taken or with the revision of plans to address the coming Validate and Deploy stages.

The key deliverables from the Configure stage may include:

- ◆ Configured components
- ◆ Test environment
- ◆ End-User Training and Train-the-Trainer curriculum
- ◆ Assist in development of Help Desk procedures

### **Validate Stage**

The Validate stage is a full-function test of the new system. The objective of this phase is to perform complete testing on the configured application and prepare for pilot production. To achieve a valid test, the integrated project team will perform the following activities:

- ◆ Fully test the City's application in compliance with the Unit and Integrated System Test Plans previously prepared.
- ◆ Implement the Training Plan developed during the Design stage, prepare the City's staff, and pilot end users to use and/or maintain the application.
- ◆ Create the production environment by working with the City to ensure that production hardware is installed, software is loaded, databases are built, and data is prepared.

The key deliverables from the Validate stage may include:

- ◆ Executed tests
- ◆ Configuration Iterations

- ◆ Pilot environment

### **Deploy Stage**

The first activity, execution of the production pilot, is used to test readiness for a full production deployment and is conducted in a subset of the City's business environment such as a region or district.

Next, all elements of the implementation are brought together to successfully transition from the production pilot to full deployment. The remaining end users will be trained, the help desk implemented, ongoing operational support will achieve readiness, and the Integrated Project Team will complete final configuration and tuning based on what was learned in the production pilot.

Key activities to support this objective include:

- ◆ Production pilot with a subset of the user community to validate that the system meets all the business requirements and is acceptable to the end users.
- ◆ Monitor the system to ensure that the pilot users are using the system as expected, to validate estimates of transaction volumes, and to track system usage on various components of the architecture.
- ◆ Review sessions with pilot users
- ◆ System transition to support staff
- ◆ Full production rollout

# Critical Success Factors, Assumptions and Project Risks

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## CRITICAL SUCCESS FACTORS

Opus Group' experience in implementing Siebel applications has shown that there are certain Critical Success Factors (CSF) which represent goals that must be achieved by the client in order for the project to be perceived as having been successful. Opus Group asks the City of Atlanta to consider these carefully in the planning and execution of this project:

- ◆ The most important success factor is to have access to dedicated Executive Sponsors to provide active and visible support for the project.
- ◆ The second most important success factor is to use as much core functionality as possible since these reflect Opus Group' view of best practices. This differs from traditional approaches in which the project is seen as a unique customized development project.
- ◆ The third most important success factor is to have a phased approach to the project in which the first phase stays as close as possible to existing Siebel functionality. Subsequent phases will examine how company processes are impacted and therefore how core Siebel functionality should be customized.

The following Critical Success Factors are also important and should not be neglected (they are not ranked in order of importance):

- ◆ Timely review and sign-off of all deliverables.
- ◆ Provision of adequate technical infrastructure, hardware and software to support development, testing / QA / certification, and production implementation of the Siebel applications.
- ◆ Adherence to a strict change control process is imperative to maintain focus on the project scope and planned deliverables.
- ◆ Empowerment of the Project Manager or Project Management Team to make rapid, appropriate decisions related to project scope and assigned tasks.
- ◆ Unfettered access, as required, to data in existing systems to support both the initial data load / conversion and the development and testing of regular data feeds.

- ◆ Development of a well-planned training project that adequately communicates management's expectations and instructs the end users on proper system use and operation.
- ◆ Adequate access to Subject Matter Experts from both the business units involved and from the client information technology organization for consultation as necessary throughout the project lifecycle.
- ◆ Assignment of a release manager to coordinate and manage the development, test and production environments.

## ASSUMPTIONS

The following assumptions have been made during development of the discussion document and affect the basis of this discussion document.

- ◆ The City will have primary responsibility for managing the project.
- ◆ The City Executive Sponsor will be available when needed.
- ◆ Subject matter experts will be available when needed.
- ◆ The City is defining new business processes that will be fully operational before the City project begins.
- ◆ The City will be responsible for cleansing all the City legacy data.
- ◆ The City will provide Opus Group with all business rules needed to configure Siebel software.
- ◆ The City's network will be installed and running in accordance with Siebel specifications.
- ◆ The project plan, resource, and cost estimates are based on very high-level discussions and will be refined at defined re-estimation milestones.
- ◆ Post-implementation support (help desk, operations, etc.) will be the responsibility of the City.
- ◆ When at the City site, the City will provide suitable living space for Opus Group staff at a facility of their choice, including adequate environmental controls, lighting, telephones, and network access including access to the World Wide Web via the Intranet.
- ◆ The City will participate in good faith in a mutually agreed upon change control procedure including a Change Control Board (CCB) with representation from the City, Opus Group, and any other third parties deemed necessary to administer and manage project change requests. All project change requests must be submitted and processed through the change control procedure and executed by a representative of both parties before being undertaken by the project team.

- ◆ The City understands that any changes approved via the delegated Change Control Board can impact project costs and time frames. As such, the City will work in conjunction with Opus Group Global Services to aggressively manage scope and functionality in order to meet the business objectives.
- ◆ The data formats for the information to be imported from all external systems need to be provided by the dates indicated in the project plan.
- ◆ Workflow policies and procedures need to be finalized early in the design stage. The City needs to provide the mechanism for any external electronic notification (e.g. a MAPI-compliant email server, or interface to a paging system).

# Price Quote

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## PRICE QUOTE

All Services related to this Project, as outlined in this ROM, shall be performed on a time and materials basis for approximately **One Million, Eight Hundred Thousand, Two Hundred Fifteen Dollars and Five Cents (US\$ 1,860,215.05)**. This estimate is based on the information that Opus Group acquired during meetings with the City and Opus Group's experience in delivering many CRM projects over the past years.

## Cost of Implementation Services

The applicable billing rate for Consultants shall be at the rates set forth in the table below. Services are estimated and billed on an hourly basis, based upon an eight (8) hour workday per Consultant, forty (40) hour week per Consultant. Any and all hours in excess of ten (10) hours per day per Consultant or fifty (50) hours per week per Consultant require the prior written consent of Opus Group; however, all hours worked will be billed to and paid the City. All overtime shall be billed at the same hourly rate per Consultant as regular time for such Consultant.

Consultant Labor Category	Hourly Rate	Estimated Effort (Hours)	Estimated Subtotal (US\$)
Testing Specialist	\$ 97.15	556.72	\$ 54,085.22
Advanced Technology Application Developer	\$ 127.00	5,196.17	\$ 659,913.86
Project Manager	\$ 147.20	1,920.00	\$ 282,624.00
Subject Matter Expert	\$ 176.64	2,858.22	\$ 504,875.93
Senior Subject Matter Expert	\$ 196.27	1,827.67	\$ 358,716.05
<b>Estimated Consultant Fees for Project:</b>		<b>12,358.62</b>	<b>\$ 1,860,215.05</b>

## Project Schedule

All services detailed in this proposal, including final deliverables, will be completed within 24 months from the project start date.

*Legislative Summary*

Committee of Purview

FINANCE EXECUTIVE COMMITTEE

**Caption:**

A RESOLUTION TO AMEND RESOLUTION 12-R-1741, WHICH AUTHORIZED THE CITY OF ATLANTA TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER FC-6381, WITH OPUS GROUP, LLC, FOR THE ATL311 CALL CENTER PROJECT IMPLEMENTATION, UTILIZING THE PRINCE GEORGE'S COUNTY, MARYLAND INFORMATION TECHNOLOGY CONSULTING AND TECHNICAL SERVICES CONTRACT NUMBER S11-115, TO PROVIDE FOR A CONTRACT TERM OF TWO (2) YEARS; AND FOR OTHER PURPOSES.

**Council Meeting Date:**

March 18, 2013

A resolution authorizing the Mayor to enter into an Amendment No. 1 agreement to FC-6381; for the purposes of clarifying the contract terms of twenty-four (24) months.

**Contract Type:**

Non-professional Services

**Source Selection:**

Cooperative Agreement

**Bids/Proposals Due:**

N/A

**Invitations Issued:**

N/A

**Bids/Proposals Received:**

N/A

**Background:**

Resolution 12-R-174, as adopted, did not reflect the contract terms. Amendment No. 1 states that the contract terms shall be for twenty-four (24) months; with no renewal options.

**Fund Account Center:**

Project and Grants ("PnG"): Project Number 05111397 (311 Call Center).

**Fiscal Impact (if any):**

N/A

**Term of Contract:**

Shall be for a term of twenty-four (24) months; with no renewal options

**Method of Cost Recovery:** N/A

**Approvals:**

**DOF:**

**DOL:**

Approved

**Prepared By:** Eugene F. Fuller, Jr., Esq., Contracting Officer (404) 865-8709

**Contract Number:** FC-6381

TRANSMITTAL FORM FOR LEGISLATION

TO: MAYOR'S OFFICE

ATTN: CANDACE BYRD

Dept.'s Legislative Liaison: Kieva Morrison

Contact Number: 404-330-6264

Originating Department: Department of Information Technology

Committee(s) of Purview: Finance/Executive Committee

Chief of Staff Deadline: Friday, February 22, 2013

Anticipated Committee Meeting Date(s): Wednesday, March 13, 2013

Anticipated Full Council Date: Monday, March 18, 2013

Legislative Counsel's Signature: [Signature]

Chief Information Officer Signature (for IT Procurements) [Signature]

Commissioner Signature: \_\_\_\_\_

Chief Procurement Officer Signature: [Signature]

**CAPTION**

Mayor's Staff Only

**A RESOLUTION**

**BY FINANCE/EXECUTIVE COMMITTEE**

**A RESOLUTION TO AMEND RESOLUTION 12-R-1741, WHICH AUTHORIZED THE CITY OF ATLANTA TO ENTER INTO COOPERATIVE PURCHASING AGREEMENT NUMBER FC-6381, WITH OPUS GROUP, LLC, FOR THE ATL311 CALL CENTER PROJECT IMPLEMENTATION, UTILIZING THE PRINCE GEORGE'S COUNTY, MARYLAND INFORMATION TECHNOLOGY CONSULTING AND TECHNICAL SERVICES CONTRACT NUMBER S11-115, TO PROVIDE FOR A CONTRACT TERM OF TWO (2) YEARS; AND FOR OTHER PURPOSES.**

**FINANCIAL IMPACT: (if any) N/A**

Received by CPO: \_\_\_\_\_  
(date)

Received by LC from CPO: \_\_\_\_\_  
(date)

Received by Mayor's Office: 2.22.13  
(date)

Reviewed by: [Signature]  
(date)

Submitted to Council: \_\_\_\_\_  
(date)