

Salesforce Enhancements

City Council A Session

September 1, 2022 | Agenda Item #5

Brenda Hicks-Sorensen, Director,
Economic Development

Background

State of Texas Department of Information Resources (DIR) contract DIR-TSO-4288 with Carahsoft Technology Corporation

Development and implementation services the Economic Development Department's (EDD) Salesforce Content Management

Expand utilization of Salesforce to all EDD divisions for a common CRM platform: Industry, Global and Small Business Office

Scope of Work

INDUSTRY

- Upgrade EDD's management of business incentive agreements
- Expand functionality to track company information, leads, projects, & campaigns
- Add data validation and security protocols for business incentive compliance monitoring

GLOBAL

- Improve accessibility through integration with Microsoft 365 & process automation
- Increase cross functional collaboration across departments
- Design a Customer Relationship Management (CRM) tool to include CASA San Antonio

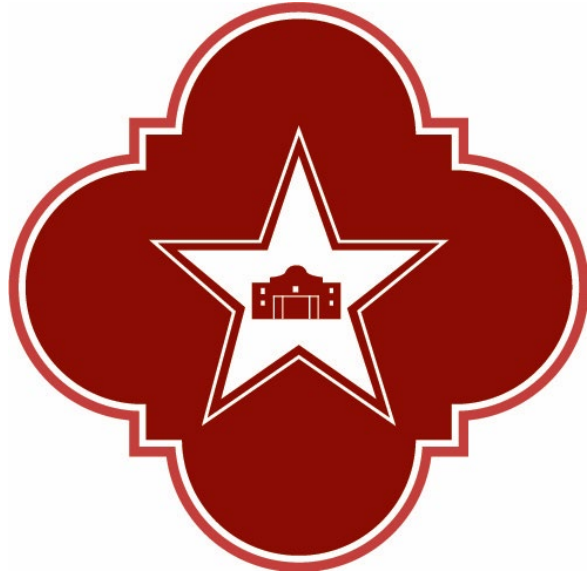
SMALL BUSINESS

- Improve existing processes, efficiencies and automate opportunities
- Create a CRM tool for small business outreach and reporting structure for partner contracts
- Update existing SBEDA portal for project initiation and compliance

Budget Review

Estimated Contract value	\$200,642
FY 2022- FY 2027 CIP Program	\$140,000
EDD General Fund FY 2022	\$42,000
Additional Licenses FY 2023*	\$18,642
*Subject to City Council Budget Approval FY'23	

City shall utilize the State of Texas Department of Information Resources (DIR) contract DIR-TSO-4288 with Carahsoft Technology Corporation (Carahsoft) to provide additional licensing, development, and implementation services for the Economic Development Department (EDD).



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