
Relational, Not Transactional

Building Cary's 311

TOWN of CARY
Case Study



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Relational, Not Transactional

Building Cary's 311

Executive Summary

In the late 2010s, Cary, North Carolina, saw new development within its jurisdiction begin to slow as its remaining vacant land dwindled. Slowing development meant slowing revenue growth, and on top of that, aging infrastructure in the oldest areas of Cary would only become more expensive to maintain.

As Cary began to shift from a growing community to a maturing one, the Town of Cary needed to utilize its resources wisely by prioritizing projects and services in order to maintain the same level of service with revenue streams leveling off.

To set up the organization for its most successful future, the Town kicked off a deliberate and concerted effort, led by newly hired Town Manager Sean R. Stegall, to assess its existing processes for efficiency. Cary staff started by rethinking the handling of citizen requests.

On January 2, 2020, Cary launched 311, one phone number for citizens to call for all requests, to streamline the process of getting citizens the information they need. One of the main reasons Stegall and Assistant Town Manager/Chief Innovation Officer Dan Ault were hired was to implement 311 and connect the organization through one platform – Salesforce, something they previously accomplished in Elgin, Ill.

Prior to this multi-year 311 implementation project, citizens previously called one of many emergency or non-emergency phone numbers, and sometimes staff members directly, for information. However, this was not sustainable or the best use of staff – or citizen – time.

Cary employees from across the organization volunteered to lead this game changing initiative for the organization. Representatives from Cary's three main non-emergency call centers also volunteered to serve as the customer service representatives in 311, also known as Citizen Advocates.

In line with the organization's larger effort to reevaluate processes, Cary staff used the 311 project to review and question the business practices surrounding these call centers, including what worked well and what could be improved. By doing this, the Town could build 311 using lessons learned from the previous call centers.

Staff researched other 311 centers across the country and experimented to see what worked for their organization and their vision. But along the way, they learned that not every experiment is successful; halfway through, Cary staff had to breathe new life into the 311 pilot, utilizing a new direction and new leader to get them to the finish line.

Throughout the experience, staff faced numerous adaptive issues, particularly when it came to change, including change in their title, change in where they worked or change in how they did business.

In order to take its citizen service to the next level, the Cary invested in one platform – Salesforce – to document and share all information across the organization and provide a 360-degree view of each citizen from why they called the Town for information to when they had a water leak. This database of knowledge would allow more staff to be able to assist citizens on a wider variety of issues, ultimately freeing up staff time and improving the accuracy and consistency of information.

Cary envisioned one day utilizing Salesforce in all aspects of its business, from program registration to water leak reporting to inspection scheduling, providing the Town with a deeper understanding of the impacts it makes on its citizens every day in order to make better decisions and elevate citizen trust.

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Introduction

In 2020, the Town of Cary was known for its quality of life and high-quality customer service.

That level of service manifested in many ways, whether it be pristine parks and venues, real-time traffic signal adjustments or solid waste collectors who returned to a home if a citizen forgot to put out their trash.

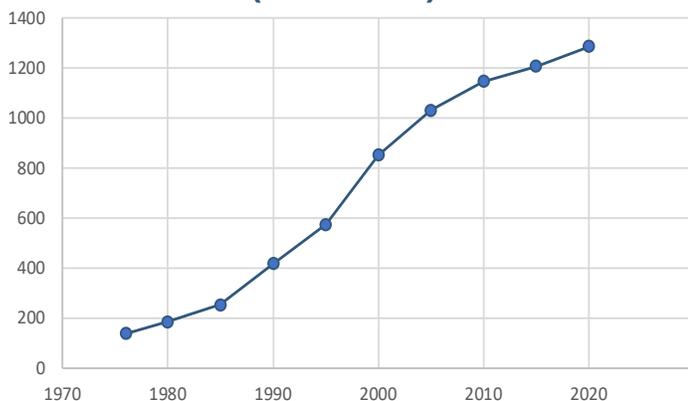
Exceptional, specialized staff with decades' worth of experience made this level of service possible. A majority of this staff came on board in the 1990s in response to rapid development and population growth.

Cary's population grew from 8,000 residents in 1970 to more than 171,000 in 2020, making Cary the seventh largest municipality in the state and the third largest municipality in the Triangle, the region anchored by the cities of Raleigh, Durham and Chapel Hill.

This rapid growth meant the Town could reinvest revenue generated by new development back into the community by building new roads, parks, and other assets and amenities. To build and manage these assets, the Town added more than 1,100 new positions during those 40 years.

"Traditionally, in a growth community, when you're green-field and growing, you need to keep adding people because your volume and magnitude of work is increasing," Assistant Town Manager/Chief Innovation Officer Dan Ault said.

Town of Cary Authorized Positions (1976-2020)



Cary grew 20 times its population between 1970 and 2020, and only 16 percent of land in the Town remained available for development. Slowing development meant slowing revenue growth. On top of that, aging infrastructure in the oldest areas of town was only becoming more expensive to maintain.

So as Cary began to shift from a growing community to a maturing one, the way the Town conducted business also had to evolve.

In the coming years, Cary needed to utilize its resources wisely by prioritizing projects and services in order to maintain the same level of service with revenue streams leveling off. At the same time, institutional knowledge within the organization began to disappear as those who grew up with the Town retired. Hiring new people could be a short-term stopgap but not a long-term solution.

"We're going to reach a point where there's no more green-field growth," Ault said. "We're going to have a finite number of land miles, and we're going to have more problems and not the same amount of revenue coming in to pay for adding new positions."

To set up the organization for its most successful future, the Town kicked off a deliberate and concerted effort to assess its existing processes for efficiency.

One of the first ways the Town would rethink its business practices would be in terms of handling citizen requests. While citizens previously called one of many emergency and nonemergency call centers, and sometimes staff members directly, for information, this wasn't sustainable or the best use of staff — or citizen — time.

In 2020, the Town implemented one phone number for citizens to call for all requests in order to streamline processes and create a more efficient, yet still high quality, way of doing business.

"It was like changing the engine while the airplane is still flying," Public Information Supervisor Carolyn Roman¹ said.

How did the Town re-imagine the way it had always done business and implement a 311 Center? And how would implementing such a system improve efficiency?

¹Services Design Coordinator as of 2019.

Background

311 is a nonemergency phone number people call in many cities across the country for information about government programs and services, as well as to report problems. The first system started in Baltimore, Md., in 1996 to relieve the city's 911 line, which was overwhelmed by calls that needed police attention but didn't require immediate action.

In the early 2000s, other cities, including New York and Chicago, realized the benefits of this type of nonemergency line and decided to expand it to cover all municipal services.

As 311 evolved, cities like Chattanooga, Tenn., began using data collected to make more informed decisions. Then other cities, including Elgin, Ill., took it a step further by un siloing the data and using it more holistically to make decisions.

As 311 trended nationally, Cary considered implementing it in the early 2000s to continue to improve its citizen experience. Such a change would mean combining the Town's three nonemergency call centers into one space. But a 311 project didn't move forward at the time.

While most 311 centers are implemented because the government entity is not adequately responding to citizen requests, that wasn't Cary's problem. The Town's exceptional staff made it possible to provide high-quality service to its citizens despite silos, a lack of consistency among call centers, and some inefficiencies.

"Fundamentally, all of our call centers' missions were the same — to answer questions and make sure we were responsive," Development Services Director Scot Berry¹ said. "But the tools they were using were all different, and some of the metrics they were tracking were different."

By moving Cary staff from call centers to a shared space without upgrading to one platform, every subject area would continue to operate the same way; they'd have their own software and processes, meaning silos of information would remain within each group and would not be shared.

This can be seen in other 311 centers in the country where the center is divided into pods of staff who, while all in one place, have different areas of expertise, use different tools

and can't access one another's information. This makes it nearly impossible for these customer service representatives to be generalists. As a result, the person who takes the call can't always answer the question, and the call needs to be rerouted to someone else in the room.

"A lot of people do it the way we envisioned it in the early 2000s," Berry said. "You just bring everyone together in one space and start working with the technology you have." For Cary, that was 10 pieces of software.

In order to take its already exceptional citizen service to the next level, the Town needed to invest in one platform — one single source of knowledge — to share all information across the organization and provide a 360-degree view of each citizen from why they called the Town for information to when they had a water leak. This database of knowledge would allow more staff to be able to assist citizens on a wider variety of issues, ultimately freeing up staff time and improving the accuracy and consistency of information.

But to invest in such a system didn't seem worth it in the early 2000s since the Town already provided great service.

"We were doing the right things for our citizens," Berry said. "There wasn't a bunch of dysfunction everywhere. We were checking the most basic box, so until the Town invested in a system like Salesforce, it really didn't make sense for us to do 311."

However, in 2016, the Cary Town Council hired Sean R. Stegall as the Town's new manager. Stegall came from Elgin, the first local government agency to use Salesforce.

The time had come for Cary to take the next step in its citizen experience journey.

¹Planning & Development Services Director as of 2018.

Planning for the Future

Cary staff first met Stegall in early 2016 when they looked into purchasing new technology to replace aging software in multiple departments, and Salesforce was one of the products under consideration.

For example, the Public Works Department utilized a 20-year-old case management system that would soon be discontinued. In response, department staff looked into other products and found mostly specialized products for water and sewer or facilities or operations. But what they wanted was one product to do it all.

"I always said 'no' to everything because I hated the idea of [the customer service representatives] being in one software and having to switch over to another software to do something else and having them be in eight different places," Public Works and Utilities Operations Analyst Betsie Winokur¹ said. "We wanted something where they could just stay in one place all the time. We never really found one that fit our needs."

After Chief Information Officer Nicole Raimundo came on board in 2015, Raimundo suggested Salesforce and brought in Stegall and Ault to learn more about how they implemented Salesforce in Elgin, Winokur said.

"We never called it 311, but that was always our concept and what we wanted," Winokur said.

At that point, Stegall already led the City of Elgin as it launched its 311 to more efficiently handle citizen, visitor and business requests and inquiries.

It was his approach to sharing data across Elgin by breaking down silos and prioritizing work in order to utilize resources more efficiently that ushered the city through the Great Recession. It was also this approach that led the Cary Town Council to hire him as the new manager with the expectation he would implement 311 in Cary.

Stegall started his career with the Town by sharing his leadership philosophies and laying the foundation for a culture that emphasized holistic, data-driven decisions and innovative solutions. This included the concept that in order to utilize resources more efficiently, the Town needed to operate more like a start-up; staff could not be boxed in by their

¹Facilities Division Manager as of 2020.

Timeline

February 2016	Elgin's Sean R. Stegall and Dan Ault visit Cary
May 2016	Cary Purchased First Salesforce Licenses
August 2016	Cary Town Council Hired Stegall as Town Manager
December 2016	Stegall Hires Ault as Assistant Town Manager/Chief Innovation Officer
May 14-17 2018	Staff Attend Association of Government Call Center Professionals Conference
April-December 2018	311 Pilot
January-December 2019	Pilot Phase II
January 2, 2020	311 Official Launch

role and needed to feel comfortable experimenting to find new and better ways of doing business.

Shortly after Stegall's arrival, conversations about implementing 311 at the Town resurfaced for the first time since the early 2000s.

The Town purchased its first Salesforce licenses in May 2016. Momentum picked up even more when Stegall hired Ault, who implemented Salesforce in Elgin, to further support implementation and development of Salesforce and 311 in Cary.



Getting Started

Before Salesforce, if a citizen called the public works line, customer service representatives for that department took the call. If the call only required an answer, it was not documented. But if the call required the department to “roll a truck,” the customer service representative created a work order in their previous case management system.

But it didn't end there.

Next, the representative printed off the work order and placed it in mailboxes for supervisors to pick up and hand out to their staff to complete the next business day. If a call required more immediate attention, like a water leak repair, the customer service representative called the correct staff member over radio to complete the task that day.

Other call centers at the Town operated similarly. While they may have used different tools and perfected their process with the software they had, there were still ways to be more efficient, whether that was through a more customized software or refreshed processes.

“We have great employees trapped by stagnant technology that are unable to get the information they need,” Ault said.

Once the Public Works Department realized Salesforce may work, staff worked with a Salesforce implementation consultant and the Town's IT Department in 2016 and 2017 to

build an operations management system in Salesforce. This included a case intake page to document calls about potholes, graffiti, trash on public property, facility repairs and other public works-related requests.

So why Cary?

Most 311 centers are implemented for political reasons or to solve a problem, Ault said, like improving response times or the quality and consistency of information disseminated to citizens.

Since developing 311 is often a reactive measure, just launching it becomes the top priority with the understanding that any inefficiencies or kinks will be worked out later. But oftentimes, not all of those kinks get worked out, and band-aids are put on processes to keep the machine running.

However, Cary's fortunate circumstances allowed the Town to take a slower approach and be more proactive and deliberate in developing a 311 center that served as the hub of the organization and utilized Salesforce as its single source of knowledge. These circumstances included existing high-quality citizen service, high community opinion, employee talent and adequate resources.

Because of these circumstances, the Town could focus on not just combining its call centers but creating more efficient processes by keeping what worked well in its call centers and improving or stopping what didn't.

“I bet there's a lot of duct tape in everyone's departments, which speaks to us as employees,” Roman said. “We know that we have to get a job done, and we're willing to do whatever it takes.”

“But we've been given the opportunity to reconfigure and pull off the duct tape,” she said. “It might hurt a little bit in the short term, but in the long term, we can achieve what we feel like we're here to do every day — provide high-quality service — but a lot easier and more effectively.”

When Ault joined the organization in December 2016, he began by attending several standing meetings to learn more about the Town and meet people who could one day create and operate 311. During that time, he shared his vision, gauged people's interest in participating and assessed who would help the project succeed.

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Ault said it was a slow and deliberate process — a tenant of Cary's new culture — where he started talking about 311, allowing the concepts to sink in and the organization to become more open to it, as well as allow interested staff to raise their hand and self-select to join the team to implement it.

"I took several years of learning and studying 311, and you can't shortcut all of that," Ault said. "So an important element was pace. Organizationally, so many things had to ripen culturally for us."

“

In your efforts to lead a community, you will often be thinking and acting ahead of them. But if you get too far ahead, raising issues before they are ready to be addressed, you create an opportunity for those you lead to sideline both you and the issue. You need to wait until the issue is ripe, or ripen it yourself."

"Leadership on the Line" page 146

Out of this assessment period came a planning team made up of six staff members: Berry, Roman, Public Works and Utilities Customer Service Supervisor Brenda Mann¹, Revenue Manager Gregory Jenkins, Chief Technology Officer Peter Kennedy and Assistant to the Manager Allison Hutchins².

The planning team met weekly for more than a year to discuss both the technical and adaptive elements of piloting and implementing a 311 center.

The group started by finding out more about 311 centers across the country, including how they operate and how they're structured. In late 2017 through early 2018, the team interviewed 11 different centers to see if any such operated in the way the team envisioned.

"We've always felt the vision would include some sort of cradle to grave service," Roman said. "So you call and connect with the Town and that same person will advocate on your behalf and help you navigate the Town world until your problem is solved. I love the concept of an advocate speaking up and helping our citizens feel empowered that their local government is approachable."

311 Planning Team

Scot Berry | Development Services Director

Allison Hutchins | Assistant to the Manager

Gregory Jenkins | Revenue Manager

Peter Kennedy | Chief Technology Officer

Brenda Mann | Public Works and Utilities

Customer Service Supervisor

Carolyn Roman | Public Information Supervisor

But when the work group spoke with 311 centers across the country, this is not what they found.

"It turned out that what we wanted to build here, what we were imagining here was this unicorn. It didn't exist anywhere else," Roman said. "We found that a lot of folks just try to merge people physically in a room together, but they don't address the processes."

By then, Cary staff imagined a much more relational, not transactional, 311.

"No one wants to be a number," Roman said. "Even if I'm a citizen and talk to a different person the next time I call, I'm still being treated as though they know me, and they know my full story already."

To provide citizens with the most complete, accurate and consistent information, as well as fair service, the organization needed a way for its staff to track and collaborate on every project, service or citizen interaction on the same platform.

"I very much believe in unified customer service and consistency," Development Customer Service Representative Jeanne Good said. "I think that's the only way to ensure citizens' trust, is if we are consistent and fair and honest about what we are able to provide and what we're not able to provide."

This approach would also save both staff and citizen time. For instance, prior to 311, citizens would call one of the call

¹Retired from the Town after 25 years of service in August 2019.

²Organizational Development Manager as of 2018.

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center phone numbers for assistance with an issue related to those service areas. But sometimes, citizens wouldn't always know who to talk to, particularly if it was about another topic, like events, construction or traffic calming.

This resulted in citizens emailing and calling multiple staff members who would all work on tracking down the information until they recognized the duplicative efforts. Specialization across the organization also created a challenge when only one person could answer a question and they were in a meeting or out of the office.

By sharing information regarding projects, services and citizens on one platform — Salesforce — staff could more easily access information they need.

"You have this really powerful information system and people interacting with it and bringing their intelligence and talent into that system so that we are able to collaborate in a greater way," Ault said. "You're really collecting intelligence, so it's like a big brain."

In spring 2018, several members of the planning team attended the Association of Government Contact Center Professionals Annual Conference, but what they found proved their vision didn't exist anywhere else.

"That was absolutely the final nail in the coffin that if we were going to make our vision come to reality, we had to put our heads together and figure it out ourselves, because there was not something out there to replicate," Roman said.



For the rest of the conference, the team worked in one of the hotel conference rooms brainstorming ideas and a plan to move forward with the 311 center they envisioned.

"We didn't really have a plan," Berry said. "That was the point. We didn't want to just go and do. We were worried about the people and working through the people side before the actual implementation."

Upon returning to Cary, the 311 team connected with staff from the three nonemergency call centers — development services, utility accounts and public works — to share the vision and gain interest in participation in a pilot.

A lot of excitement circulated around the vision and the belief that 311's implementation would move the Town into a new era of excellence with a new kind of call taker — citizen advocates.

"They're beyond a customer service person," Ault said. "They're somebody who has your back, is ensuring things are run down and is instilling confidence that we've got it."

During the survey of customer service representatives, while some expressed interest in being a part of implementing 311, others raised questions about what their future at the Town would look like if they didn't want to be a part of it.

"An old school process would have been, 'Okay. You're a customer service representative today, and tomorrow you're just moving to 311,'" Berry said. "But we didn't want people to feel like they had to be in the center if they didn't want to be a part of it. They weren't going to be great advocates if they didn't want to do it. We wanted people to raise their hand."

Pilot

Several customer service representatives from the development services, utility accounts and public works call centers raised their hand or agreed to be included in 311's creation, implementation and operation.

"Just the whole idea of it and what the vision of it was going to be when it got to be up and running and just how important it was to the Town, it was kind of an honor to be a part of, because we've heard from the beginning this is the best of the best," Development Services Customer Service Supervisor Kelli LaFrance-Girard¹ said.

Ultimately, the planning team selected five volunteers to serve as the Town's first test group of citizen advocates. This included two supervisors, Mann and LaFrance-Girard, and one high performer from each of the three call centers — Good from development services, Cindy Woedy² from public works and Stacey Blue³ from utility accounts.

"It sounded like it was going to be something that's prestigious, fast paced and the pulse of Cary," Blue said.

In the early part of 2018, the planning team discussed everything from call volumes to the location of 311 to the equipment needed. The team selected a centrally located, temporary space on the first floor of Town Hall even though they knew it wouldn't be large enough long term.

"It's not real until there's a space," Ault said. "The space now is intentionally probably a little bit smaller than you would normally design it because we know it needs to have

a permanent space. But waiting for a permanent space would have been a catastrophic problem, because we still probably wouldn't have a space right now."

Ault said while the 311 pilot proceeded faster than he anticipated, finding a space was a turning point.

"Getting into the space — that's part of what the team did and that was something I was so appreciative of because it ripened the issue," he said. "It kind of forced us to not wait for it to be perfect and just start doing it."

In May 2018, the team met with Stegall for approval of their rough plan for an eight-month pilot. Using an Agile approach, they broke up the eight-month plan into four, eight-week cycles, called sprints, with the intent of transitioning from a part-time group using disparate systems and processes to one unit of generalists.

"It remains important to the team that this effort be centered around employees," the planning team wrote in a memo to Stegall. "We understand that taking the traditional approach of standing up new pieces of technology, advertising the number 3-1-1 and then moving on to the next project would be a disservice to an organization and community of our caliber. We have the opportunity with 311 to impact and prepare our culture for a highly-digital future, breaking down barriers to who can access information and fully utilizing the capacity of our employees."

While Ault had experience with Salesforce, he didn't want to dictate exactly how it should be implemented in Cary. For starters, he wanted to give the team enough room to experiment and learn for themselves what worked.

311 Pilot Sprint Schedule

Sprint	Dates (2018)	Focus Area
1	May to June	Leveling Expectations and Accessibility
2	July to August	Poking Holes in Silos and Addressing Gaps
3	September to October	Establishing Roots and Expanding Capacity
4	November to December	Preparing for the Future

¹311 Supervisor as of 2019.
²311 Supervisor as of 2019.
³311 Citizen Advocate as of 2019.

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At the same time, Ault was trying to figure out how to help make it happen while in a new job that was very different from his previous position in Elgin. While he had much more formal authority than he had in Elgin, Ault said he had no informal authority. He also had a whole team to bring the vision of 311 in Cary to life — another new concept.

"I didn't know the best way to add value because it was a new organization and new people," he said.

During the first eight weeks of the pilot, the 311 planning team sought to occupy the space with the volunteer advocates, establish a regular schedule of part-time hours and outfit the space with furniture, equipment and technology.

As big-picture, vision planning wound down and the focus turned to experimenting and implementing 311, some staff members stepped away from the project, including Hutchins, who became the Town's organizational development manager, and Berry, who became the planning and development services director.

Some new faces joined the team, including Innovation and Analytics Manager Reid Serozi, Financial Strategy Analyst Hunter Frank¹ and Platform Solutions Strategist Wilson Farrell. Those on the team continued to work on the project while performing other jobs within the organization.

But the pilot wouldn't go entirely according to plan, and it was the team's excitement and ability to blaze forward on a project that would ultimately divert their attention away from a people focus to more of a technology focus.

Sprint One: People Before Technology

The pilot space opened April 23, 2018, with the five volunteer citizen advocates, including two supervisors, working 15 hours per week. They spent the rest of their time in their usual role. As part of the first sprint, the volunteer advocates answered the same calls and completed the same work assignments as they would in their usual work environments.

The phone numbers for the three original call centers continued to be in use. The volunteer advocates just answered the calls in their usual queue from a different location — 311.

The first sprint served as time for the planning team to learn about and question how the three call centers operated, including what worked well and what could be improved, as well as what was consistent and what was not. By doing this, the Town could build 311 using lessons learned from the previous call centers while utilizing one system to document and make information accessible to everyone.

"We can keep the best of what really works about their processes and marry it with the right technology to make us more efficient, so that we don't have to work harder. We can work smarter," Roman said.

The 311 planning team discovered that while each call center provided high-quality citizen service, each did it in their own way. For example, each call center handled after-hours calls differently, whether that was telling citizens to call another number, leave a message or call back the next business day.

The Town of Cary, including its call centers, was siloed, but through the pilot, staff discovered just how siloed the organization was.

"I thought I understood a lot of what we did here at Town Hall, but just very basic things like how we answer the phone or what we do after hours, it was surprising to know that was not standardized," Roman said.

Despite inconsistent, and sometimes inefficient, processes across all three call centers, each maintained high-quality citizen services because of their exceptional employees and strong relationships.



¹Left the Town of Cary in March 2019.

"We were delivering great service because we have very reliable people," Roman said. "Their relationships with each other are so strong it is like a family. You don't ever want to disappoint your parent or your sibling. They want to do good for each other."

So in building 311, the planning team needed to figure out how it could continue to utilize those strong relationships while also creating more streamlined and consistent processes.

"311 is really all about standardizing," Roman said. "Because we deliver such great service, there are probably assumptions made that we're all working from the same play book."

Sprint Two: Cross-training

Starting on July 1, 2018, the volunteer advocates increased their time spent in 311 to 25 hours per week and shifted their focus from only answering calls they had previous experience handling to training one another to be able to answer any development services, public works or utility accounts call. They also began creating training materials to teach future citizen advocates.

"Ultimately, we believe the best way to learn is by doing," the planning team wrote. "During these eight weeks, the supervisors will be helping advocates actively practice taking calls in areas other than their own."

Cross-training included experts coming into the 311 space to educate the volunteer advocates on different issues they may receive calls about, like recycling, but it turned out to be time consuming.

"You can't just sit somebody down and say, 'Here's all the information. This is how you handle this call, because every call is different,'" Woedy said. "So in order for them to really get how it works and get to the point where they're comfortable on the call is by having them do it."

During sprint two, the planning team also researched how many citizen advocates they needed once 311 launched and the advocates' anticipated titles, pay and responsibilities.

To estimate how many citizen advocates 311 needed, the Town used the employee-to-call ratio from Washington, D.C.'s 311 center. Based on that data and the size of Cary's

temporary 311 space, the planning team determined they needed 12 citizen advocates at launch.

Creating a New Case Intake Page

While the planning team knew Salesforce was the tool that would tie the entire organization together, team members didn't know exactly what they needed built into the system to document and track calls made to the Town.

When the 311 pilot kicked off, the volunteer advocates used the case intake page built for public works to document all calls.

But the group quickly figured out it would not work long term. For instance, each public works case automatically generated a work order. But while each call that came into 311 needed to be documented, they didn't all require work to be completed.

"It became very apparent that what we had needed to be changed. The system itself wasn't really built to support the vision that the Town has using Salesforce across the board," Roman said. "I think, as with so many things that we are learning, what we did in 2017 was good for what we needed at that time."

While the case intake page needed to evolve, it allowed staff, particularly at public works, to get comfortable with using Salesforce, IT Platform Developer Brandon Fitch¹ said.

"It's really the foundation, and it's good that public works is using the work orders now and they're comfortable with it," he said.

To figure out what a new case intake page would look like, permissions were given to staff outside IT, namely Serozi and Frank, to experiment and build. Ault instructed the duo, who taught themselves how to use Salesforce via Trailhead, to build a new case intake page with out-of-the-box features.

This approach was new to the Town; previously when new technology was needed, a department or division would approach IT to either build or purchase software.

But Ault didn't want a case intake page built based on the way the volunteer advocates were already taking calls, so he asked Serozi and Frank to question processes to ensure

¹Left the Town of Cary in January 2020.

the case intake page created collected data the Town actually needed rather than what the organization always collected.

"If you build a system based off your past assumptions or past operating procedures, you are going to get the same results," Ault said. "It was an attempt to blow that up and make sure that we are actually capturing the data that needed to be captured."

Ault also believed that Serozi and Frank's fresh eyes and lack of experience in Salesforce would create a simpler and easier to use product.

In attempting to build a new case intake page, Serozi and Frank's methodology was to observe the volunteer advocates, document the processes each used in their previous call centers and build a case intake page based on what they learned.

"We made a conscious effort to not sit down with the advocates and immediately start to show them Salesforce. We just listened. We parked our ears next to each advocate and listened to their phone calls, got to know who they are as people, got to know about their families and what they love," Serozi said. "The goal with any relationship building is to build trust."

And their fresh eyes did provide value in determining what processes worked well and what could be improved.

"They did a really great job of almost becoming like embedded journalists," Roman said. "So every day they were sitting in there, listening to calls, asking questions about why the conversation went a certain way, why it was routed a certain way, and what would make things better or worse."

The Town's software team, including Fitch, Farrell and IT Platform Developer Brian Yarsawich, lived in IT at the time and had, early on, been responsible for implementing Salesforce within the organization, as is commonplace for any company adding a new technology. The team made tweaks to the existing case intake page to allow 311 to utilize it in the interim.

"We understood that this was a pilot effort and that what we had done in the past was not necessarily what we were going forward with," Farrell said.

When Ault instructed Serozi and Frank to create a new case intake page, the software team stepped back from 311 development and focused more on Salesforce implementation and development in other areas of the organization, particularly in the Public Works Department.

While both groups — the software team and Serozi and Frank — worked on different pieces within Salesforce, those pieces were expected to work together long term. But different teams working on different projects with different departments that had different needs paired with a lack of communication between the groups resulted in frustrations over how the Town would actually use Salesforce and whose decision it was to make.

"As we were going through the pilot, that started to be a hindrance not to have some clarity behind development and ownership of the technology," Roman said.

Sprint Three: Technology Before People

In September 2018, the planning team kicked off the third sprint, where the volunteer advocates increased their time to 32 hours per week while continuing cross-training and training document creation. They also expanded their knowledge into a new area by beginning to take human-resources-related calls.

But as the hours spent in 311 increased, cross-training slowed as priorities shifted.

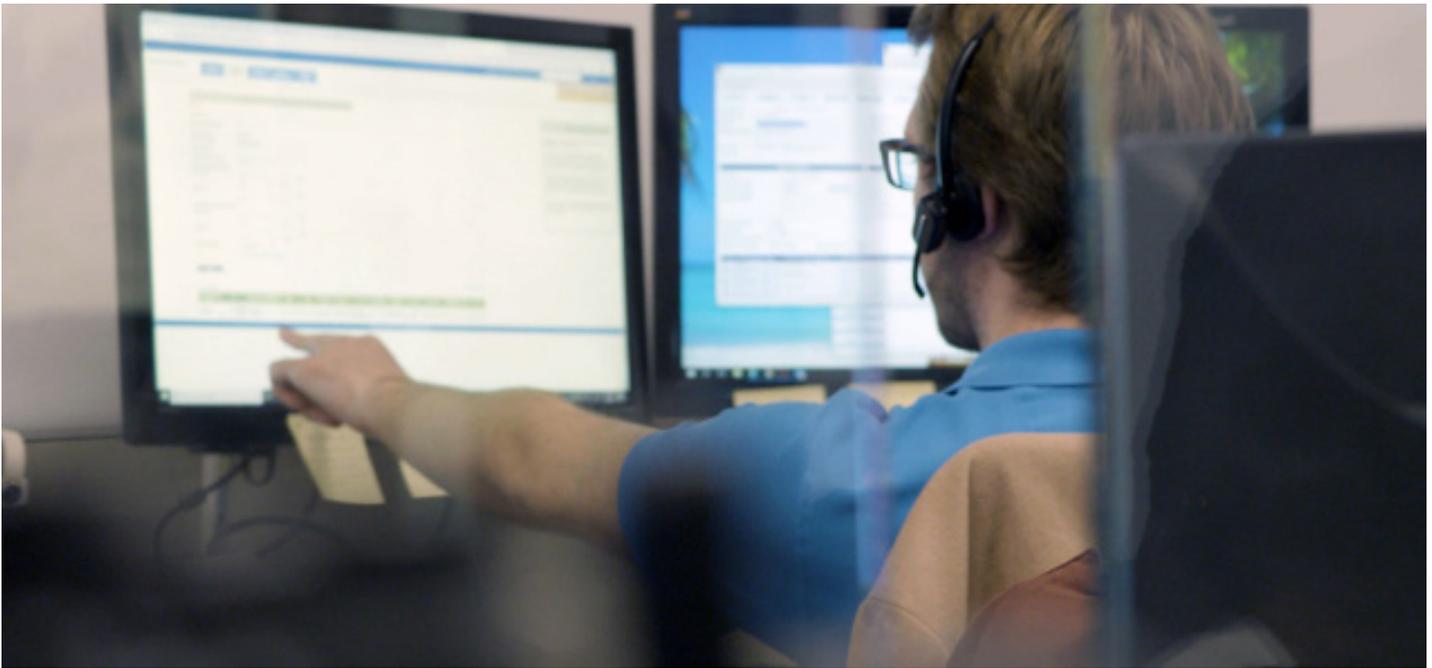
"I think it was easy to fall into old habits, and we didn't hold each other accountable," Roman said.

One of the biggest distractors was that members of the planning team still had jobs in other departments and couldn't commit 100 percent to 311.

For many, including Roman, LaFrance-Girard and Mann, it meant supervising employees from afar. In Mann's case, she supervised four people even though she spent most of her week in 311, located two miles away.

Having a planning team of staff members from different areas within the organization also meant they had different bosses who supported the project at varying levels.

As the time spent in 311 ramped up, members of the team felt tugged in multiple directions. Unsure of the direc-



tion they were headed and wanting to feel they were still making progress, naturally, they began to revert back to a check-a-box mentality, focusing mainly on creating the new case intake page.

"I think in times of chaos, we look for something clear that feels like we are making progress instead of just embracing the messy," Roman said.

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"Changing the status quo generates tension and produces heat by surfacing hidden conflicts and challenging organizational culture. It's deep and natural human impulse to seek order and calm, and organizations and communities can tolerate only so much distress before recoiling."

"Leadership on the Line" page 107

To complete the case intake page, Serozi and Frank felt they needed to sit down with the volunteer advocates one-on-one to learn how each process worked to ensure they made a page that suited their needs.

But between answering phones and showing Serozi and Frank their processes, the volunteer advocates didn't have much time to cross-train.

"Hunter and I tried so hard not to lead with technology," Serozi said. "But even though I say that, I can think of many examples where we did get stuck on the technology and it hindered our ability to be adaptive and bring people together. When I think about our learning opportunities, I think that's one of the biggest ones."

Thinking about other ways they could move the project forward, the planning team also thought about putting what they researched during the pilot into practice, including adding citizen advocates, changing on-hold messages or even selecting a single case intake page for the entire organization to use.

But no one in the group felt like they had the authority to implement these changes.

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"If you have been in a senior role for a while and there's a problem, it is almost certain that you had some part in creating it and are part of the reason it has not yet been addressed."

"Leadership on the Line" page 90

"We had ideas for things to implement without an idea if it was okay to implement them," Roman said. "I didn't feel

like I had the authority. I felt like, 'Who am I to make these decisions when we have people who formally oversee call centers to do that?' Maybe that was my piece of the mess that I didn't just go and do."

Frustrations increased among the group in regard to this halt in the pace of progress brought on by a lack of authority.

"In the grand scheme of things, taking eight months to birth a case intake page, such a foundational part of our organization's future, is nothing," Roman said. "But when you're living it, and you feel like you've white boarded ad nauseam and you can't explain another process to Reid [Serozi] and Hunter [Frank] and you just want them to do something is painful."

Ault said he believed he "took for granted that, just with instructions, anyone could build it."

"I mean you're starting from scratch," Serozi said. "You're not able to look at it and say, 'This is how we've done this before or these are the best practices.' I mean you are trial by fire. You are thrown into an environment and you have to figure it out on your own."

Despite everyone being in the same room, the volunteer advocates still felt siloed because they weren't cross-training and reverted back to doing what they knew. While the group tried to start cross-training again, they were never able to regain traction during the pilot.

"Back then it was kind of like 'forge your own way,'" Blue said. "All of a sudden, it just sort of went in all kinds of directions. When we started out, we thought we were going to cross-train, but we just sat there and did our own thing and kind of just communicated with one another. But we were still doing our own stuff."

Sprint Four: Reset

Toward the end of the year, the team planned to increase the volunteer advocates' hours to 40 hours a week, meaning they would no longer spend any of their time in their previous departments.

But before that change was to go into effect, two people — Mann and Woedy — decided to return to the public works call center full time.

Mann said she stepped away because she felt the team needed to get more buy in from the rest of the organization.

"I very strongly felt that we needed to take a pause and really regroup and rethink," Mann said. "We had to be careful we weren't focusing so much on developing a page that we didn't continue to think about what it looked like for our field staff and bringing all of them on board. I could see where we were leaving people out, but we were all excited. I was excited to get this off the ground. So I think that we did go too fast without considering all partners."

Woedy said that when Mann announced she was returning to the Public Works Department, she wanted Woedy to return with her. This made Woedy second guess where she belonged.

"I didn't know my place anymore," Woedy said.

Frank also left the organization for a different job a few months later.

"Some things have to break in order to realize there's a problem," Blue said.

Launching 311

To kick off the new year, Stegall met with Development Services Manager Wes Everett¹ about taking over the 311 project and launching it by the beginning of 2020.

"Eventually we did set a date, but we didn't do it at the start. We did it once we experimented, laid a foundation and determined the vision for 311 at the Town of Cary together," Ault said. "It's easy to get caught up in hypotheticals or the version of how you think something is going to play out in your head."

Everett agreed to lead the team and began to move 311 forward in a more structured way.

"We needed a reboot in a big way," LaFrance-Girard said. "I think we had more direction and more of a timeline of when things were expected. Definitely the training was able to be prioritized."

Following the pilot, Ault told Stegall that, in order for 311 to be successful and implemented the way it was envisioned, he needed a team of people with the same goals and priorities to support it. So in January 2019, a research and development division was created. A part of R&D became focused on launching 311. This project launch team included Everett, LaFrance-Girard, Woedy, Farrell, Roman, Serozi and later Parks, Recreation and Cultural Resources Administrative Specialist Anna Crollman².

While the pilot was messy, it proved a research and development division was needed, Ault said. And those people had grown with the 311 project since its inception, seen it evolve and understood the lessons learned.

"It's made them much better now and stronger," he said. "We have a much better chance at sustainable and exponential growth because of having to go through those difficulties of having to really develop from scratch, deal with conflict, deal with overcoming all the different challenges that came from the ambiguity of how we started."

Rebooting: Project Apollo

After taking the reins, Everett connected the creation of 311 to a space theme; Project Apollo, which put humans on the

moon; and particularly connected the pilot to Project Gemini, NASA's second human spaceflight program.

"Designed to help bridge between the Mercury and Apollo programs, the Gemini program primarily tested equipment and mission procedures and trained astronauts and ground crews for future Apollo missions," according to NASA.

"I think it's very cool how he related and found value in the pilot," Roman said. "Actually, it helped me believe that we were productive and that we actually did accomplish a lot of the things we set out to do."

In the early days of his participation, Everett began by spending three weeks creating a project plan so the entire team and the organization understood the deliverables for 2020.

"I used a more traditional approach just to provide some certainty for people that were in the room," he said. "Part of it was establishing a plan and trying to put something concrete to the vision of 311 so it wasn't just this abstract concept to people."

Everett also kicked off weekly meetings with leadership to keep the team accountable.

"It allowed us to keep checking in and making sure that our requirements and deliverables were consistent," he said.

311 Project Launch Team

Anna Crollman | Parks, Recreation and Cultural Resources Administrative Specialist

Wes Everett | Development Services Manager

Wilson Farrell | Platform Solutions Strategist

Kelli LaFrance-Girard | Development Services Customer Service Supervisor

Reid Serozi | Innovation and Analytics Manager

Carolyn Roman | Public Information Supervisor

Cindy Woedy | Public Works and Utilities Customer Service Representative

¹311 Manager as of 2019.

²Operations and Change Management Specialist as of 2019.

Once he created a plan, Everett and the project launch team went on an intro tour to all departments to get the message out and prepare staff for what was to come and how they would be influential in 311's success.

As of 2019, the Town had Salesforce licenses for three years. Yet since not everyone had the same level of access — a majority of the organization could only access Chatter — there were varying levels of acceptance, use and knowledge of the platform with many not understanding how it would help make them more efficient and how it would complement 311.

"The challenge was going up against people's preconceived notions of what 311 was going to be," Everett said. "So for the folks for whom it's just a call center, trying to express and have them understand and see a vision that's far greater than that is challenging. We're still working on that."

The message during these meetings was that 311 powered with Salesforce would free up staff time to work on other projects because they wouldn't have to take as many calls. This is because citizen advocates would be able to pull the information documented in Salesforce to answer questions about projects and services.

"Ultimately, our goal is to be able to answer as many questions as we can in 311," Everett said.

There was mixed support for this concept with some staff excited about being able to focus on their projects without having to respond to as many citizen inquiries. Others felt like, while they won't have to respond to as many calls, that time would be spent documenting their projects to keep Salesforce up to date.

In addition to sharing the vision for 311, the intro tour meetings allowed the team to clear up any misconceptions staff had about what 311 was and what it would look like. For example, some staff believed the three call centers would immediately shut down once 311 launched; instead, the transition would be much more gradual.

Mann said it was these conversations she felt had been missing in the pilot.

"We had a lot of discussions and then came back together again with a fresh look of making sure that we were involving everybody and bringing the advocates together and

allowing them to first be together as a group in the 311 center and take those calls and then learn what Salesforce could do and get that under their belt."

Power Users and Outreach

During the intro tour, the project launch team introduced the concept of power users, or a few people per department or division with full access to Salesforce who could assist their groups in completing cases and collaborating with 311.

The team created the concept of power users in response to limited licensing, meaning not everyone at the Town could have full Salesforce access. To ensure that, while licenses were limited, the necessary people saw cases to complete them, power users would be responsible for getting the case information to their teams.

Because of this model, the team focused primarily on educating the power users on how the Town would create and manage cases in Salesforce while sharing more of the big picture vision with the rest of the organization.

But something unexpected happened. Salesforce agreed to sell the Town unlimited licenses so everyone in the organization could have full access. This would ultimately allow anyone to create, respond to and close cases.

"We didn't prep staff for that. We wanted everyone to understand what was going on, but in terms of the nuts and bolts of collaborating and training, we had really focused on the power users," Everett said. "Now, all of a sudden, everybody had access."

This resulted in some people getting cases when they hadn't been trained and didn't know what to do or how to respond to them.

"That's the part about helping people understand that there's sometimes going to be some messiness, and that's just part of the process," Everett said.

Because of the licensing shift, power user responsibilities began to subsequently shift from being the distributor and manager of cases for their department or division to becoming a Salesforce trainer and 311 ambassador, ensuring their teams understood the vision and knew what to do when they were transferred a case.

The project launch team also began training non-power users in the organization upon request; Everett held office hours for questions, and Crollman created a series of videos and training tools to share across the organization.

Getting on the Same Page

Around the start of the new year, the organization still used multiple case intake pages to conduct business. Since a new case intake page had not been completed, Fitch built one.

It took several months to make tweaks to the page that worked for all three stakeholder groups — public works, development services and utility accounts — because they all valued different information. For instance, while utility accounts valued knowing who called, public works valued knowing what they called about, what work needed to be completed and its location.

"Brandon [Fitch] built the page, but there were still tweaks, and you had three different stakeholder groups tugging at him for sometimes competing needs," Everett said. "Brandon was really nice, and it was hard for him to disappoint anybody."

The project launch team implemented the new case intake page town-wide in July 2019 while deactivating all other case intake pages.

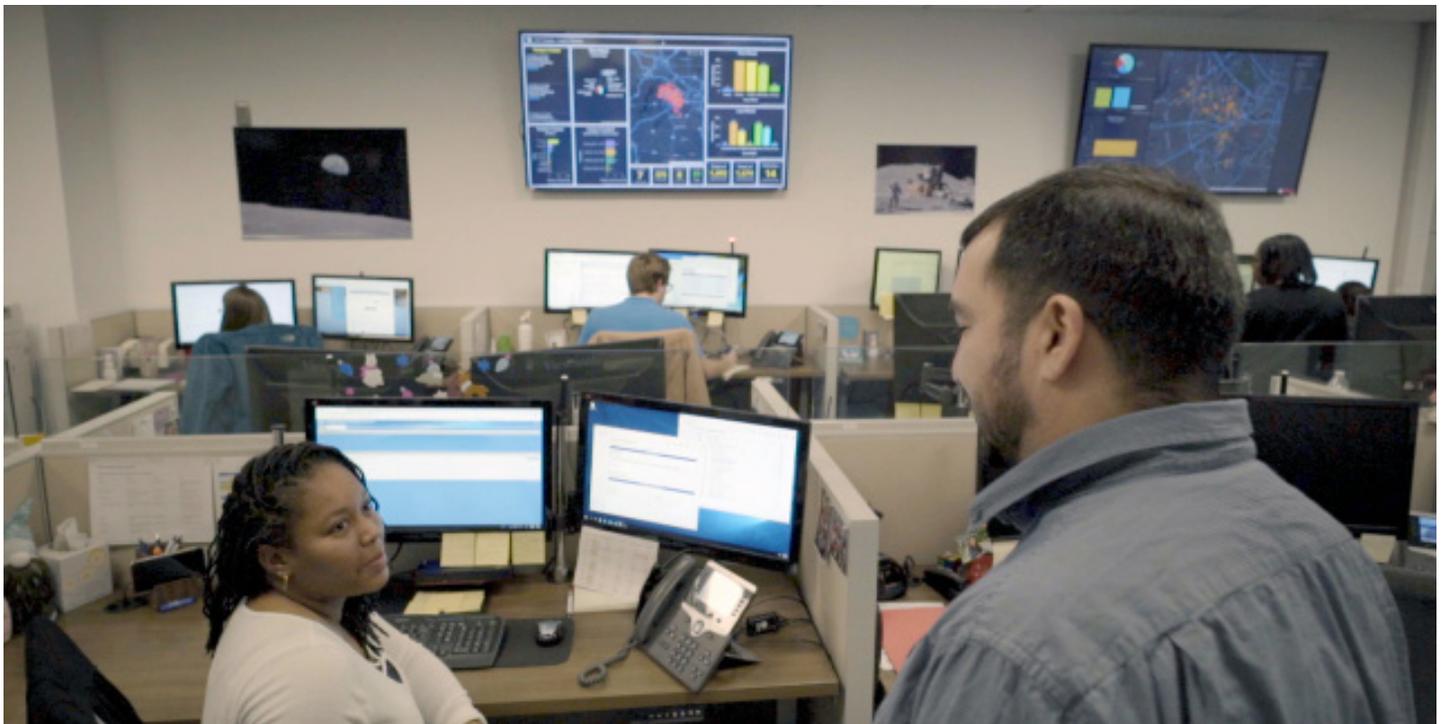
"That was a milestone because until we are all looking at the same thing, it was really hard to get the same outcomes from 311," Everett said.

It took a little time to adjust to the new page, particularly for those departments that were already using another version of a case intake page.

"I think people had a hard time letting things go," Winokur said. "When you get something in your head and you're used to doing things a certain way, I think it's really hard to give it up. But I think once that got out there and you realized it's really not a big thing, I think it was fine."

Around the same time, Woedy returned to 311, a move she had been contemplating since Everett joined the project.

"I kept wanting to come back to 311, but I kept thinking, 'Is that a step backward?'" Woedy said. "Then when I finally decided, at first I was still a little apprehensive, but I love it here now."



New Opportunities

By July 2019, it was time to put out a call for interested Cary employees to apply for a spot as a citizen advocate. Everett and the project launch team looked for curious, tech-savvy individuals with a passion for serving and who worked well under pressure.

Nineteen people from ten different divisions within the Town applied. Applicants ranged in experience from temporary, part-time employees to veterans with more than 25 years of experience.

"I think that speaks to the type of employees that we have that just want to help citizens," Roman said. "I think that the message of don't put yourself in a box is being heard and people are putting themselves out there."

Hiring people internally, particularly from such a wide range of departments, brought a vast breadth of institutional knowledge and experience to the room as opposed to hiring someone from outside the organization and having to teach them everything about how it operates.

"That's just phenomenal in terms of putting us ahead of where we ever would have thought our schedule would be in terms of the knowledge that we have in the room," Everett said.

While the team hoped to officially launch 311 in January 2020 with 12 citizen advocates, they also weren't just trying to fill seats. Instead, the team wanted to find people who were a good fit and would be successful. The project launch team invited 11 candidates to work in 311 on a trial basis, and nine of them accepted. They brought in those nine people in August in two phases to make it more manageable to train everyone. The trial period allowed the team to ensure the prospective advocates were a good fit.

"It's not for everybody," Everett said. "We want to preserve the flexibility in this process. What we don't want to do is say, 'Now you're a 311 citizen advocate,' and then maybe it's not a good fit and now their position that they came from has been filled."

Following the selection process, Ault met those who weren't selected to redirect their excitement into other projects that would be beneficial for the success of 311.

"I spent time meeting with them, and we'll continue to do that so we can channel that energy into positive areas," he said.

One of the original volunteer advocates, Good, also found another opportunity for herself within the organization after spending months working with Farrell. After speaking with him, she learned the organization needed someone for data quality within Salesforce.

"I'm a huge fan of Salesforce. I absolutely love the product. I love the possibilities for the Town," Good said. "In the whole quest for consistency, I don't know that there's a better way to provide consistent service except having it all in a single place. I think there's an opportunity to really know our citizens more intimately as a result of this product, and I think it's also a huge opportunity for staff to understand each other's process better as a result of having all the information in one place."

Once the team selected the prospective advocates, Everett wanted to get them in the room full time right away but knew, to be successful, 311 needed to minimize any disruption to the departments they came from during the transition.

"I understand that sometimes it's not so easy for somebody to step out of their role because we're good at that at the Town, where one person knows how to do something really well and so you pull them out and it's really burdensome," Everett said. "That's a lot of unnecessary stress on our candidates, but it's also a lot of unnecessary stress on their teams and colleagues. I didn't want people to hate 311 because it made them do extra work. They didn't ask for that."

As prospective advocates moved from one area of the organization, their positions went with them.

"There's that sense of loss. As somebody who's put together a request for positions before, when you get them, you feel like they're yours, and we're kind of shifting our focus organizationally that those are the Town's and don't belong to any one group," Everett said.

Counting Down and Taking Off

Starting in September 2019, prospective advocates kicked off more intensive training about topics they may receive calls about, like leaf collection.

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Building Cary's 311

Training consisted of a combination of deep dive studies, where an expert within the organization taught them about that topic and gave them the opportunity to ask questions, as well as research and field work, like a ride-along with an inspector “so they’ll see and experience what they’re talking about to help give them some context.”

“The first group has been phenomenal, and it’s just been so much fun to watch their excitement and watch their enthusiasm and their passion for this,” Everett said. “They really want this, and they all seem to have the skills we are looking for — just a group of self-starters. There’s nobody that just sits around and waits to be told, which is fantastic.”

As part of training, each advocate would start in one of the three skill areas — public works, utility accounts or development services. They would observe calls for about two weeks before they would take calls with the “coach” for that area listening in. The coaches were Woedy, LaFrance-Girard and Blue. Each prospective advocate would learn that skill area before rotating to another one in order to be more generalists rather than specialists.

But having Woedy, LaFrance-Girard and Blue listen in on calls turned out to be challenging. First, it was difficult to listen in on multiple calls at the same time. Second, it left the three strongest people in the room unavailable to take calls while they were training the new advocates.

In response, 311 had to clearly communicate to the other call centers that, for that period of time, there would be a drop in level of service from 311 as they trained new people.

“Everybody involved and affected was very gracious and generous about it,” Everett said. “The 311 launch was really the result of everybody participating. Everybody had skin in the game because when we were training, they were picking up the slack.”

Eight of the candidates, plus Blue, Woedy and LaFrance-Girard, were officially installed as 311 citizen advocates at the end of September. Mann, who retired in August 2019 after 25 years of service, returned to the Town in November on a part-time, temporary basis at Everett’s invitation to assist with training.

All of this led up to a soft launch on November 22 prior to January 2, the official launch date of 311, to ease citizens and staff into the change. For example, in November, 311 quietly expanded its hours from 7 a.m. to 7 p.m.

“By the soft launch, we wanted to be through training, or at least the initial rotations, so everybody had exposure to all three skill areas,” Everett said.

While previously three separate numbers routed to three different queues with three different greetings at the other end of the line, as of December 2019, all three numbers were rerouted to 311, where one greeting gave a citizen options to press a number for utility accounts, development services and public works questions.

“It was all soft stuff. It was all planning and people. The pilot took care of a lot of the technical,” Everett said. “They did all the heavy lifting. I mean this really big set of LEGOs was there, and some of it was put together. I just put a few more pieces together with the team.”



Adaptive Challenges

"The 311 team realizes that this isn't about implementing Salesforce or merging call centers, however crucial those individually will be in this initiative's success," the planning team wrote. "This is about understanding how the habits and behaviors of our employees — and ultimately our citizens — will change because of this endeavor. This endeavor is very much about doing something that hasn't been done before and in a way that is unprecedented. The work conducted thus far, and its cadence, have been purposeful; we have prioritized our cultural adaptations over our technological ones."

While numerous adaptive challenges arose during the creation of 311, most revolved around the concepts of change and loss.

“Confronting the gaps between our values and behavior — the internal contradictions in our lives and communities — requires going through a period of loss. Adaptive work often demands some disloyalty to our roots.”
“Leadership on the Line” page 93

Changes to What You Do

Many organizational changes coincided with the 311 pilot, including dissolution of the Public Information Office and merging of the Planning, Development Services and Inspections & Permits departments.

At the time, Roman worked in the Public Information Office.

"I felt like as my involvement ramped up at 311 that I was losing more PIO and that was really hard because that's why I came to the Town," she said. "Even as we were going through the pilot, I had to remind myself that what we're doing is more than a call center. It's a gigantic infrastructure of information."

During the pilot, lines blurred between people's usual jobs and their role building 311. At the same time, the planning team invested a lot of time in 311 without knowing what

would happen next and where they were going. Some operated for months without a job title or description as their old role began to evolve into their new one.

"It takes a lot of patience on the part of the people involved," Ault said. "They have to kind of go along for the ride and trust that we're going to have their backs and that it's going to lead to things that are going to help them become the better version of whatever they want to become here."

But, Ault said, it can be difficult to maintain that trust when in the midst of an awkward "in-between" or transition role.

“Leadership addresses emotional as well as conceptual work. When you lead people through difficult change, you take them on an emotional roller coaster because you are asking them to relinquish something — a belief, a value, a behavior — that they hold dear.”
“Leadership on the Line” page 116

Outside of 311, other staff also dealt with the concept of loss when it came to who they are within a changing organization and how it would impact them. As 311 began to drastically alter the way the Town operated, there were varying levels of support (or lack thereof).

"What it comes down to is a culture change that is to some extent threatening. It means consolidating areas where there's lots of specialization is necessary," Ault said. "People can see the writing on the wall, so they're trying to gauge the timing of when is my job as I know it not going to be my job as I know it."

Changes to Where You Are

Roman said that as her participation in 311 increased, she felt like she was neglecting the two employees she supervised.

"There was just a feeling like you were never giving enough. I felt like I couldn't give 100 percent to [public information specialists Kathryn Trogdon and Stephen McNulty] or give 100 percent to 311. There just weren't enough hours in a day," she said.

Mann, who spent her entire career in the Public Works Department and was accustomed to being in the trenches with her staff, had to supervise them from a different building.

"When Cindy and I left public works to come to the pilot, I mean, our hearts were at public works," she said. "It was part of our hearts that was just kind of ripped out a little bit because we just loved public works. But at the same time, we knew that change was good and it can make things better."

Blue, LaFrance-Girard and Woedy described feeling like they were abandoning their colleagues, staff or departments — things they knew — to be a part of 311, which still had so many unknowns. So it was frustrating during the pilot when it felt like 311 still wasn't working.

"I kind of felt like I was abandoning the department, because there were certain things I was doing in the other department that there's no possible way to do them in 311," Blue said. "I kind of felt like I was dropping the ball on that."

Because this happened, the departments they came from needed to decide if they wanted to continue handling those responsibilities, and if yes, who would take over.

Changes to How You Operate

Like many departments, the transition to Salesforce for the Public Works Department was a transition from paper to technology. Staff who, at one point, didn't have an email address, were now issued a tablet to receive work orders.

"We struggled with that a lot," Winokur said.

Winokur linked this reticence by some to adopt the new technology back to a Town of Cary world before Stegall, Ault and Raimundo, a world where IT held a tighter grip on technology, creating a fear among some staff that if they used technology, they may do something wrong.

"You know what I love about Salesforce? Is that we have tapped into a whole new skill set here in the building," Winokur said. "People that never really considered themselves tech-savvy are now tech-savvy. People in this building never had email, and to think that we've given everybody an iPad. I mean, it's amazing. So I love that. I love that they empower people."

Once they felt empowered, it was just a matter of educating them on Salesforce through PowerPoints, Q&A sessions and a lot of one-on-one meetings.

"I literally used to have a line out of my cube every day for the first probably year that we did this," Winokur said. "I never said, 'Hey. You need to call IT,' or 'Hey. You need to do this.' You have to make time for every single person, because if you don't, they're just going to turn it off and toss it."

Everett also utilized trainings and one-on-one sessions to train people in Salesforce. But getting people to change behaviors sounds a lot easier than it actually is, particularly when people feel like what they do still adds value.

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"To persuade people to give up the love they know for a love they've never experienced means convincing them to take a leap of faith in themselves and in life. They must experience the loss of a relationship that, despite its problems, provides satisfaction and familiarity, and they will suffer the discomfort of sustained uncertainty about what will replace it."

"Leadership on the Line" page 26

"You have to develop some level of trust that you have their best interests at heart," Everett said. "I'm not doing this just because I want to change what you're doing. It's because this is going to help you ultimately. But you have to have a relationship first for that to work."

Meeting with staff one-on-one to show them how Salesforce works and how it could benefit them had the most positive impact, Everett said.

"The most impact that I've seen often happens one-on-one," Everett said. "When somebody really starts to use Salesforce, and they can click on a person, see rezoning cases associated with them or redevelopment permits, code violations, etc."

"When somebody really starts to see that and how so much of what we do can really be connected in one place, that's when the light bulb goes on and they start really asking questions and thinking about how this can really change the way they do business," he said.

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Building Cary's 311

And small reminders were also used to reinforce positive changes, for example, suggestions that someone move a conversation from a long email conversation into Chatter.

"We all need those reminders because we're creatures of habit and we'll default to an email or a phone call," Everett said. "But the system is only going to be successful if we put information into it."

In order for 311 to be successful, staff behaviors need to continue to change, particularly spending their time in Salesforce and using Chatter, Ault said.

"It's getting better, but you can't do things offline," he said. "You somehow have to collaborate on everything."

Conclusion

The Town of Cary's 311 center launched January 2, 2020, but very little actually changed that day because most of the implementation had been completed in preceding weeks to quietly and painlessly transition citizens to this new world.

"My perspective is a lot of this process has been about patience, needing to ripen things and giving people opportunities," Ault said. "I think it's a good example of the type of culture that we want for big initiatives."

Now that the Town successfully completed the first step in its 311 vision — launching — R&D staff began to set its sights on more ways to grow and evolve.

During 2020, the R&D team expected to focus on expanding citizen advocate knowledge of other areas, including parks and recreation, transportation and utilities. Citizen advocates would continue to build on their knowledge of the three core skill areas with the expectation that those three nonemergency call centers would close by 2021 so all day-to-day citizen requests and questions filtered through 311.

"While we are already fully servicing the 311 original areas of focus, our goal is to provide basic information and services across the whole town," Everett said.

But to continue to be successful now and into the future, staff would need to continue to assess and improve processes to utilize resources more efficiently, not just in 311 but throughout the organization. And any enhancements made to the way the Town conducted business needed to be documented in Salesforce for an even loftier vision to become reality.

The Town of Cary could one day become an organization that utilized Salesforce in all aspects of its business providing the Town with a deeper understanding of the impacts it makes on its citizens every day in order to make better decisions and elevate citizen trust.

"What's happening in 311 will capture so much of that — how little decisions that local government employees make every day have such a big impact," Ault said. "And I think the world needs that. I think it restores trust in government through a common workspace. There has to be a window into seeing the positive consequences that local government employees have."



Resources



Dan Ault
Assistant Town
Manager/Chief
Innovation Officer



Scot Berry
Planning &
Services Director



Stacey Blue
Citizen Advocate



Wes Everett
311 Manager



Wilson Farrell
Platform Solutions
Strategist



Hunter Frank
Former Financial
Strategy Analyst



Brandon Fitch
Former IT Platform
Developer



Jeanne Good
Development
Customer
Services
Representative



**Kelli LaFrance-
Girard**
311 Supervisor



Brenda Mann
Public Works
and Utilities
Customer Service
Supervisor,
Retired



Carolyn Roman
Services Design
Coordinator



Reid Serozi
Innovation and
Analytics Manager



Betsie Winokur
Facilities Division
Manager



Cindy Woedy
311 Supervisor



Brian Yarsawich
IT Platform
Developer