



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

ID:	AP-CRM-001
Title:	Customer Relationship Management Standard
Domain:	Application
Discipline:	Application Management
Date Updated:	12/22/2017
Revision no.:	2
Original date:	9/29/2014

I. Authority, Applicability and Purpose

- A. **Authority:** Title 29, Chapter 90C provides broad statutory authority to the Department of Technology and Information to implement statewide and interagency technology solutions, policy, standards and guidelines for the State of Delaware's technology infrastructure. "Technology" means computing and telecommunications systems, their supporting infrastructure and interconnectivity used to acquire, transport, process, analyze, store, and disseminate information or data electronically. The term "technology" includes systems and equipment associated with e-government and internet initiatives.
- B. **Applicability:** Applies to all State of Delaware communications and computing resources. DTI is an Executive Branch Agency and has no authority over the customers in Legislative and Judicial Branches, as well as School Districts, and other Federal and Local Government entities that use these resources. However, all users, including these entities, must agree to abide by all policies, standards promulgated by DTI as a condition of funding and continued use of these resources.
- C. **Purpose:** The management of customer relationships is critical to many of the State's business processes. This standard defines the software platforms and products that are to be used by the State of Delaware in Customer Relationship Management.



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

II. Scope

- A. **Audience:** This document is intended for Solution Architects, Project Managers, Application Developers, their managers and application development contractors for the State. This document is not intended for use by non-IT personnel.
- B. **Applicability:** This standard will cover all CRM platforms and products installed, contracted for, externally housed, or in any other way required by the State of Delaware, except for large email based outreach.
- C. **Environments:** Often CRM applications are an adjunct to an existing system. As such, they should be integrated with the host system(s) in a way that if the CRM solution needs to be changed, the host systems will require minimum changes.

At all possible times, the personal data housed in the CRM should be scrubbed or anonymized when it is used for any purpose other than maintaining a relationship.

III. Process

- A. **Adoption:** These standards have been adopted by the Department of Technology and Information (DTI) through the Technology and Architecture Standards Committee (TASC) and are applicable to all Information Technology use throughout the State of Delaware.
- B. **Revision:** Technology is constantly evolving; therefore, the standards will need to be regularly reviewed. It is the intent of TASC to review each standard annually. TASC is open to suggestions and comments from knowledgeable individuals within the State, although we ask that they be channeled through your Information Resource Manager (IRM).
- C. **Contractors:** Contractors or other third parties are required to comply with these standards when proposing technology solutions to DTI or other State entities. Failure to do so could result in rejection by the Delaware Technology Investment Council. For further guidance, or to seek review of a component that is not rated below, contact the TASC at dti_tasc@state.de.us.
- D. **Implementation responsibility:** DTI and/or the organization's technical staff will implement these standards during the course of normal business activities, including business case review, architectural review, project execution and the design, development, or support of systems.
- E. **Enforcement:** DTI will enforce this standard during the course of normal business activities, including business case and architectural review of proposed projects and during the design, development, or support of systems. This standard may also be enforced by others during the course of their normal business activities, including audits and design reviews.
- F. **Contact us:** Any questions or comments should be directed to dti_tasc@state.de.us.



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

IV. Definitions/Declarations

A. Definitions

1. **Customer Relationship Management (CRM)**¹ – Customer relationship management (CRM) software addresses customer life cycle management business processes, and provides functionality to enterprises in sales, marketing and customer service (including call and contact centers) through collaborative, operational and analytical components.
2. **The fundamental preferences for CRM**² vary between organizations. A sampling of desired features includes:
 - Tracking of business information
 - Case management
 - Online inquiry tracking
 - Communication activity tracking
 - Marketing and outreach campaign management
 - Partner and educational contact tracking
 - Online knowledge base.
 - Offer configurable redesign of work flow processes for simplified adaptation to changing business requirements and regulations
 - Integrate previously disparate departments and isolated information systems
 - Centralize shared services
 - Realize Cost Savings
 - Improve Customer Service and Marketing Outreach
 - Enhance Performance Management and Analytics
 - Enable Cradle to Grave Performance Tracking
 - Facilitate Data Exchange.
 - Specific Government objectives have emerged that have unique requirements and challenges that have elevated the CRM software requirements, i.e. the Open Government Directive and Cloud First Policy
3. **Information Resource Manager (IRM)** – Those assigned the responsibility to act as the primary points of contact for appropriate communications between DTI and the organization.

¹ <https://www.gartner.com/it-glossary/customer-relationship-management-crm>

² https://www.fbo.gov/index?s=opportunity&mode=form&id=bcd12df6c6de98c1446528814f7e22d0&tab=core&_cvview=1



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

4. **ITIC (internal Technology Investment Council)** – A committee created by the TIC with the responsibility of reviewing technology investments in the form of a Business Case Summary to ensure that the resulting investment is compliant with state-wide policies, standards and sound practices.
5. **TIC (Technology Investment Council)** – The body established by Delaware code with the responsibility of overseeing the technology investments of the State.

B. Declarations

1. DTI, contractors and/or the State organization's technical staff will implement this standard during the course of normal business activities, including proposing technology solutions, business case submissions, business case review, architectural review, project execution and the design, development, or support of systems.
2. Security and Privacy must be of paramount concern and built into the entire system.
3. When possible, allow Opt-In; that is, the default is that the person whose relationship is being managed should have to consent to being included in the system.
4. When possible allow Opt-Out by providing the mechanisms for the relationship to be broken and even deleted
5. **Suggested Functionality for CRM**
 - Flexibility to use standard platform objects as well as custom created objects that will be specific to the business processes
 - Integrated User/Profile/Role Management
 - Ability to collaborate with other users as well on individual records
 - Ability to automate business processes through workflow
 - Ability to measure success through analytics
 - Ability to aggregate customer data from multiple locations, including manual entry, lead capture, websites, social platforms, and other communication platforms
 - Ability to make information available on demand
 - Ability to expose data to external users like partners or even the general public
 - Ability to interact with other external databases in real time
 - Extensible and Pluggable
 - Ability to integrate easily with other systems
 - Adhere to all statutory compliance measures (audit trails, rules-based policy enforcement, etc.)
 - Capability to support mandated policies including:
 - DTI's Cloud First Policy
 - HIPAA

These standards are adopted by the Department of Technology and Information (DTI), through the Technology and Architecture Standards Committee (TASC), and are applicable to all Information Technology use throughout the State of Delaware. Any questions or comments should be directed to dti_tasc@state.de.us.



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

- ISO 27001
- [State of Delaware Information Security Policy](#)

V. Definitions of Ratings

Individual components within a Standard will be rated in one of the following categories.

COMPONENT RATING	USAGE NOTES
STANDARD – DTI offers internal support and/or has arranged for external vendor support as well (where applicable). DTI believes the component is robust and solidly positioned in its product life cycle.	These components can be used without explicit DTI approval for both <u>new projects</u> and <u>enhancement</u> of existing systems.
DECLINING – Deprecated - DTI considers the component to be a likely candidate to have support discontinued in the near future. A deprecated element is one becoming invalid or obsolete.	Via the State's waiver process, these components must be explicitly approved by DTI for <u>all projects</u> . They must not be used for <u>minor enhancement</u> and <u>system maintenance</u> without explicit DTI approval via the State's waiver process.
DISALLOWED – DTI declares the component to be unacceptable for use and will actively intervene to disallow its use when discovered.	No waiver requests for new solutions with this component rating will be considered.

- A. Missing Components** – No conclusions should be inferred if a specific component is not listed. Instead, contact TASC to obtain further information.



DELAWARE STATE-WIDE INFORMATION TECHNOLOGY AND ARCHITECTURE STANDARDS

VI. Component Assessments

Solution	Rating	Comments
Salesforce Platform	Standard	
Microsoft Dynamics	Standard	
ACT!	Declining	

These standards are adopted by the Department of Technology and Information (DTI), through the Technology and Architecture Standards Committee (TASC), and are applicable to all Information Technology use throughout the State of Delaware. Any questions or comments should be directed to dti_tasc@state.de.us.