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Customer Relationship Management and Crisis Management: Proven Emergency Response Strategies for the Public Sector

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Introduction

It is during times of crisis that citizens most need their governments to perform with excellence. Lives, property, and the economic well-being of entire communities may be at stake. So it is essential for government agencies to respond to emergencies with the greatest-possible speed and efficiency.

Crises, however, can severely test an agency's capabilities. Even under normal circumstances, it can be immensely challenging for agencies to fulfill their ever-changing, ever-growing mandates within today's tight resource constraints. When a crisis hits, those already-strained resources can instantly become completely overwhelmed.

Every government agency must therefore take aggressive steps to ensure that it is optimally prepared to handle all types of emergencies.

In particular, agencies must be able to

- Quickly gain awareness of the nature and scope of the crisis

- Quickly gather the information necessary to respond to the crisis

- Quickly deliver relevant information to all agency staff

- Quickly deliver relevant information to the general public, the media, and other agencies—despite limited contact center resources

- Quickly ascertain whether recipients are actually finding information useful

- Quickly respond to the ongoing changes in the crisis over time

Government agencies must also be able to document how they fulfilled the above requirements, in order to learn from the experience and validate their response to those to whom they may be accountable after the fact.

Customer relationship management (CRM) technology has proven to be highly effective for helping government agencies fulfill these six essential crisis management requirements with excellence and extreme efficiency. In real-world example after real-world example, agencies equipped with the right type of CRM capabilities have been able to adeptly address highly demanding crisis situations. And they have been able to do so within resource constraints that were tight enough to make even their normal day-to-day operations a challenge.

This white paper outlines how agencies at all levels of government are using CRM to cope with crises. By following these examples, government agencies can ensure their preparedness for the unexpected and optimize the quality of service they provide to their constituencies.

The Demands of a Crisis

A crisis is a situation that is out of the ordinary and that presents the potential for significant adverse consequences if not properly handled. When agencies face a crisis, they must behave differently than during the normal course of events—and they must do so with excellence to prevent the potential adverse consequences from coming to pass.

A crisis, of course, can take many forms. It can be a terrorist attack, a hurricane, flooding, an earthquake, or a tornado. It can result from the failure of the power grid or the sudden spread of a disease. It may affect an entire population or a very specific subgroup. Its potential consequences may be physical, economic, psychological—or some combination thereof. It may threaten life and limb, or it may simply be extremely disruptive and disconcerting. But whatever the specific nature of the crisis, it is the responsibility of those in charge to respond to it quickly and effectively.

Agencies often have to do many things in response to a crisis. They may have to set up shelters, evacuate people, distribute food, and/or mobilize personnel. They may have to employ technical expertise to discover the root cause of a problem—and figure out how to fix it. They may even have to turn to the private sector to procure the resources needed to handle a weather or medical emergency.

But effective crisis management also depends to a large degree on the ability of an agency to manage information and communicate with people. People need to know where shelters are and how to get food. They need to know about safety precautions and changing crisis conditions. Sometimes they can even provide the agency with critical information about what's actually going on in the field. And agency staff must be able to communicate and share information with each other so that everyone's efforts are appropriately coordinated.

Six information and communications management capabilities are particularly important during a crisis: (1) the ability to quickly gain awareness of the nature and scope of the crisis; (2) the ability to quickly gather the information necessary to respond to the crisis; (3) the ability to quickly deliver relevant information to all agency staff members; (4) the ability to quickly deliver relevant information to the general public, the media, and other agencies—despite limited contact center resources; (5) the ability to quickly ascertain whether recipients are finding information useful; and (6) the ability to quickly respond to any ongoing changes in the crisis over time.

The Ability to Quickly Gain Awareness of the Nature and Scope of the Crisis

Agencies rely on a variety of information sources to determine the nature and scope of a crisis, including their own people in the field, phone calls and e-mails from affected citizens, news media, and more. To maximize visibility into the crisis, an agency must be able to consolidate the information gleaned from these diverse sources into a common knowledge foundation. This way, decision-makers have immediate, streamlined access to all available crisis intelligence.

The Ability to Quickly Gather the Information Necessary to Respond to the Crisis

In addition to bringing coherence to the diverse information available about the crisis itself, agencies must be able to effectively manage information about the response to the crisis. This information—such as shelter locations, suggested safety precautions, and the expected duration of the crisis—typically includes both the agency's own response and that of allied organizations. By assembling this information in a consistent and accountable manner, agencies can avoid misinforming people and help quash the types of false rumors that often propagate during times of crisis.

The Ability to Quickly Deliver Relevant Information to All Agency Staff Members

Even as they gather information, agencies must be able to distribute that information in real time to staff members across all locations. This is best done electronically—using the Web, e-mail, text messages, or automated voice—because employing conventional phone calls and physical documents is typically too slow and inefficient for crisis conditions. The ability to use multiple alternative communication channels is also important to ensuring that crisis response is not hindered by the failure of any individual channel.

The Ability to Quickly Deliver Relevant Information to the General Public, the Media, and Other Agencies—Despite Limited Contact Center Resources

When a crisis hits, agencies have to be able to deliver information to wherever it's needed. Some of that delivery must be proactive (as in alerting people about crisis conditions or available aid), and some must be reactive (as in answering incoming questions about affected areas or recommended safety measures). Because crises can easily overwhelm an agency's communication capacity, it is essential to use automation to ensure that this information delivery is executed with optimum efficiency. The ability to use multiple alternative channels is also essential, for the same reasons cited above regarding the possible failure of any individual channel.

The Ability to Quickly Ascertain Whether Recipients are Finding Information Useful

A common mistake in the midst of a crisis is to assume that the information being shared is comprehensible, relevant, and accurate. In fact, in the rush to inform the public, agencies often make statements that are unclear or that don't sufficiently answer the questions that are actually of greatest concern to people. It is therefore critical for agencies to continually obtain and respond to feedback about how effective their communications are throughout the crisis.

The Ability to Quickly Respond to the Ongoing Changes in the Crisis Over Time

The gathering and delivery of information in a crisis is not a one-time event. It is something that must be done continuously to respond to changing conditions and priorities. Any approach an agency uses to perform its information and communication management tasks must therefore be well suited to the highly dynamic conditions of an ongoing crisis.

Also, as previously noted, agencies must be able to track and record all activities that take place in conjunction with the above requirements. This is important for assessing agency performance after the fact, for pinpointing opportunities to improve performance, and for demonstrating agency performance to various parties of interest.

A candid assessment of current information and communication management capabilities at most agencies is likely to reveal shortfalls in some or all of these areas. To be fully prepared for effective crisis management, agencies must therefore determine how to best acquire these essential capabilities. Failure to do so will leave those agencies vulnerable to crises—and will also increase the likelihood that any crisis will overtax its limited resources.

Leveraging CRM Capabilities to Respond Quickly and Effectively

IT decision-makers at government agencies have been aware of the applicability of CRM technology to public sector challenges for quite some time. And many agencies have implemented the technology to streamline and enhance their day-to-day operations.

The right type of CRM capabilities, however, have also proven to be highly effective in meeting the communication and information management demands associated with effective crisis response outlined in the previous section.

The specific CRM functionality that facilitates resource-effective crisis response includes a collaborative and easy-to-manage knowledgebase, highly intuitive and effective self-service, notify-on-change, information quality feedback, and customizable incident workflow automation and reporting.

A Collaborative, Easy-to-Manage Knowledgebase

In a crisis, agencies need a shared knowledgebase that is easy to build, maintain, and access. Such a knowledgebase must be designed to facilitate rapid creation of content by all authorized contributors. It must make it easy to dynamically update and edit content as crisis conditions change. It should also make it as easy as possible for users to find the particular piece of information they need right away. This can be achieved through leveraging of current artificial intelligence techniques that enable knowledgebases to automatically "learn" from user behaviors—so they can very rapidly get better and better at immediately presenting specific answers sought by users.

Highly Intuitive and Effective Self-Service

One of the most common problems in a crisis is that agencies can't respond personally to the overwhelming volume of phone calls. It is therefore essential to use the Web—as well as interactive voice response (IVR)—as effectively as possible to provide information to the general public, agency staff, and other first responders. In a crisis, agencies must be able to immediately provide Web-based access to a crisis knowledgebase. Key attributes of this Web-based access should be

- **Automatic presentation of the most-important pieces of information first.** In a crisis, Website visitors shouldn't have to spend time looking around for critical information. So this information

should be presented on a "Top 10" or "Top 20" list that appears on the main crisis page. Ideally, the CRM system should be able to "learn," from user searches, which information users need most. That way agency staff won't have to guess (possibly incorrectly) about what information matters most to the public or the agency staff.

- **Fast, user-friendly search.** When people facing an emergency need information other than that presented immediately on the "Top 10" or "Top 20" list, they are also likely to be quickly frustrated if they don't find the answers they need—or if they have to sort through numerous returned results. A crisis-effective CRM system must therefore offer a highly intuitive interface that includes keyword search, plain-language querying, and topic browsing. It should also use filtering techniques to avoid overwhelming site visitors with too many search results.

- **E-mail pre-emption.** E-mail can also become a communications bottleneck in the event of an emergency. Many site visitors may simply send an e-mail instead of checking available self-service content. This happens because people have had bad experiences with other organizations' Websites or incorrectly assume that there isn't likely to be any content on the site that is relevant to their particular question. To mitigate this potential problem, a CRM system should be capable of automatically vetting incoming e-mails, determining if any keywords in those e-mails are associated with existing knowledgebase content, and presenting that content on the Website for prospective e-mailers. In this manner, e-mail volume during the crisis can be substantially reduced and more site visitors can get the information they need immediately.

- **Extensibility to voice.** Many people do not have access to the Web—or may lose Web access as a result of the crisis. To address these conditions, agencies may want to respond to the public's needs and relieve pressure on their contact centers by making their knowledgebase available via phone-based self-service. This functionality enables people to quickly get the information they need via speech recognition or by entering numbers as prompted by an IVR script. Speech synthesis automatically converts knowledgebase content into audio messages that people can hear on the phone.

Notify-on-Change

Because conditions during a crisis can be very fluid, it may be important for people to receive alerts when information about some particular aspect of the crisis is updated or becomes otherwise obsolete. Agencies should therefore look for a CRM system that provides an option that alerts people who request a notification (typically by e-mail or text message) if a specified item in the crisis knowledgebase is modified in any way.

Information-Quality Feedback

In their haste to get information out to their staff and the general public, agencies may not have sufficient time to ensure that their wording is as clear as it could be—or even that the information they put out addresses the real concerns of their various audiences. A good CRM system must therefore provide some kind of feedback mechanisms so that information managers can be alerted to errors or shortcomings in content and respond accordingly.

Customizable Incident Workflow Automation and Reporting

During a crisis, agencies have to deal with numerous individual incidents. During and after a major storm, for example, trees and debris may block roads in many different locations. Agencies therefore need a simple, effective way to track all these incidents and ensure that they are resolved appropriately. A good CRM system will provide this essential incident management workflow, ensuring that the right people are informed about issues in a timely manner—and that issues are appropriately escalated to agency managers if they are not resolved within a reasonable period of time.

CRM systems can also help agency managers make better decisions, by providing them with insight into overall patterns in active incidents. This can enable them to determine whether more resources should be allocated to a particular location or if people are expressing concerns not anticipated at the outset of the crisis.

In fact, the use of such CRM-based incident management on a day-to-day basis can actually help mitigate or even prevent certain types of crises, by giving managers visibility into emerging trends—such as complaints about the safety of manufacturer's product or reports about a foul odor emanating from a local factory—before they blossom into full-fledged emergencies.

External, Multilocation Hosting

Crises can drive tremendous spikes in system utilization. Lots of people go to the Website. Lots of people search the knowledgebase. Lots of people send e-mails. Lots of incidents have to be entered into the system and tracked. Such spikes in utilization can put a serious strain on the capacity of an agency's existing IT infrastructure. With the right type of hosting, on the other hand, capacity can be quickly scaled to keep up with any level of demand. A hosted, software as a service (SaaS) CRM solution can therefore provide significant advantages in the event of a serious crisis. A hosted solution also provides protection against the possibility that a crisis will disable the agency's own data center.

This is obviously not a totally comprehensive list of all the technical CRM functionality that government agencies can use to more effectively respond to crises, but it highlights some of the primary ways CRM systems help agencies perform better under pressure. Equipped with these capabilities, agencies have been able to successfully respond to even the most unexpected challenges— despite the constraints of limited staff and limited IT infrastructure.

The Benefits of Leveraging CRM to Optimize Crisis Preparedness

Every agency must be fully prepared to address a crisis. This preparedness requires the thoughtful assessment of possible types of crises, diligent planning for those types of crises, and appropriate training of agency staff members.

CRM technology is also an invaluable component of optimized preparedness. With the CRM capabilities outlined in the previous section, government agencies can rapidly and effectively protect constituents, respond nimbly to changing crisis conditions, overcome resource constraints, proactively prevent crises, and document crisis response for postincident reviews and organizational learning.

Rapidly and Effectively Protect Constituents

People's safety and peace of mind—as well as general civil order—often depend on the right information's being delivered where it's needed, when it's needed. A CRM system with the necessary information and communication management capabilities is essential for fulfilling this key crisis management requirement.

Respond Nimbly to Changing Crisis Conditions

Once a crisis hits, agencies can be particularly challenged in coping with sudden changes in crisis conditions—because agency personnel already have their hands full in dealing with emergencies and may be scattered out in the field. A centralized, easily accessible CRM system makes it easier to keep everyone apprised of changing conditions and instructions even while everyone is intensively engaged in their respective activities.

Overcome Resource Constraints

Crises can overwhelm an agency's human resources and communications capacity. A CRM system that automates critical crisis management tasks can therefore be instrumental in ensuring that these limitations don't undermine the agency's ability to cope with crisis conditions. A hosted system with highly scalable capacity can be especially valuable under such conditions.

Proactively Prevent Crises Wherever Possible

Some crises can be prevented if appropriate action is taken early enough. Unfortunately, it is often difficult to detect early warning signs in the midst of day-to-day agency activities. A CRM system with the right incident management and reporting capabilities, however, can give agency managers tremendous visibility into emerging trends—thereby enabling them to investigate potential problems before they escalate into a major event.

Document Crisis Response for Postincident Reviews and Organizational Learning

Agencies that use fragmented or ad hoc methods for gathering and disseminating information are typically unable to fully record all their actions in response to a crisis. This makes it difficult to review those actions to learn from them—or to defend the agency's performance if it is called upon to do so. With a fully functional CRM system, on the other hand, all such actions are recorded—making it easy to "replay" the crisis and the agency's response as required.

CRM technology can actually be used in all kinds of ways to help agencies more effectively respond to crises. For example, special Web self-service sites can be set up to meet media demands or to ensure that critical information is available in multiple languages.

Conclusion

Government agencies can do a far better job of responding to crises if they have the right CRM system in place. It enables them to more effectively and efficiently track situations, gather information, dispense information, and make timely decisions—resulting in improved service to the public. Every agency should therefore strongly consider incorporating CRM technology into their overall crisis management strategy.

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March 2012

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200

oracle.com

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