



A 6-WEEK, STEP-BY-STEP ASSESSMENT

Dynamic 365

311 TECHNOLOGY ASSESSMENT

We'll talk to your team, look at your current setup, and review resident feedback and data. In the end, you'll see what's working, what's not, and what can be improved. Over six weeks, we'll work with your staff to understand how your 311 services run. We'll see how people contact you, how your team responds, and where technology helps, or gets in the way.

WHAT YOU'LL TAKE AWAY

After this assessment, you'll walk away with:

- A full picture of how your 311 services are set up today
- Ideas on how to improve response time and service quality
- Options for integrating with your existing systems, rather than replacing everything
- Recommendations for tools and processes that can lighten the load on your team

WHAT WE'LL DELIVER

- A full scope of what we assessed
- A simple inventory of your current tools and systems
- Data and insight that supports each recommendation
- A clear path forward, designed around what matters to your team and your community

WHY WORK WITH UPZOIDS

- We don't walk in with assumptions. We begin by listening.
- The goal isn't to replace your systems. The goal is to help you see them clearly, and figure out what's worth building on.
- Every city has a different starting point. We meet you where you are.

	What We'll Explore
Discovery	We'll begin by learning how your current service model works, from intake to resolution.
Analysis	We'll review performance data, technology use, and staff insights to identify any gaps or blockers.
Findings	We'll pull it all together into a roadmap that reflects your goals, your team, and your citizens' needs.

DISCOVERY

We'll begin by learning how your current service model works, from intake to resolution.

ANALYSIS

We'll review performance data, technology use, and staff insights to identify any gaps or blockers.

FINDINGS

We'll pull it all together into a roadmap that reflects your goals, your team, and your citizens' needs.



WHAT HAPPENS DURING THESE SIX WEEKS



We look at how citizens contact you and how those requests are handled



We compare your systems to others in the industry, not to judge, but to learn



We review past service data and resident feedback



We talk with your team about what slows them down and what helps them do their work



We outline what can be improved, what's worth keeping, and what needs a closer look



We share a practical way forward based on what we've seen and heard

HOW IT'S STRUCTURED

Weeks 1–2: Discovery and documentation

Weeks 3–4: Interviews, data review, and system walkthroughs

Final 3 Days: Sharing findings and walking through your roadmap

Your project will be supported by a Principal Consultant and a Solution Designer, both focused on helping you get the most from this process.