nintex

How government agencies are revitalizing
the citizen and supplier experience

Accelerating the delivery of excellent service

Contents

Executive Summary

Due to budget cuts, resource constraints and growing expectations, government agencies are fighting a constant battle to improve perceptions of citizens and suppliers. This whitepaper outlines how government agencies can deliver a better experience while also saving time and money for themselves and their staff by leveraging process mapping, automation and document generation.
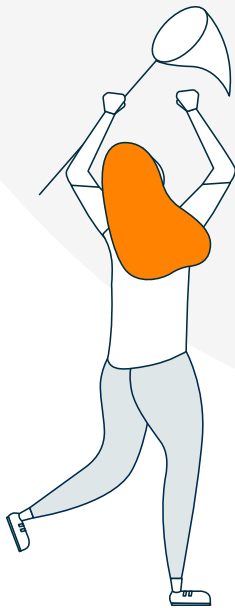
Delivering a great experience to citizens and suppliers in the public sector
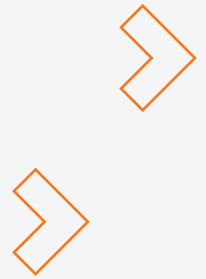
All citizens in advanced economies are, directly or indirectly, government customers. Whether they are passively using public goods like highways or actively claiming benefits from local, state or provincial agencies, they are all effectively 'customers' of the government via the payment of their taxes. This makes government agencies responsible for upholding a certain level of customer experience, but flattening or declining budgets and outdated procedures are making this a growing challenge.

At the opposite end of the spectrum, government suppliers—from recruitment agencies to IT providers, military contractors to energy providers—help governments and ultimately citizens by providing outsourced expertise. Again, these suppliers often encounter frustrations when working with government—particularly smaller agencies with less experience of navigating highly complex and opaque procurement processes. These problems make it harder for government agencies to provide the high-quality customer experience that is expected from them.

In the U.S., agencies at each level of federal, state and local government are under relentless pressure to deliver better results, faster. Customers have come to expect the high standards and formality found in federal bureaucracies to trickle down to state and local government agencies. These agencies are held to high standards, despite being ill equipped to provide them.

At the heart of this problem are the processes that underpin public sector organizations. Many of these processes are manual and paper-based in nature, creating inefficiencies that have embedded themselves into working practices that seem functional on the surface. This whitepaper outlines how process automation and the right suite of technology tools can evolve processes in the public sector so agencies at every level of federal, state and local government can serve their customers quicker and to a higher standard.

Why accelerating processes is important for improving customer and supplier interactions

Public sector organizations are responsible for profound, largescale activities: from keeping American citizens safe to deciding how the country is run. But within every arm of federal, state and local government are the less flashy but just as important processes that keep organizations moving. These are the kinds of processes that should be held under the magnifying glass—improving them can have a significant impact on how government agencies serve their customers. Some examples:

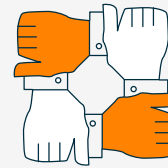## ADMINISTRATION

Tax services

Public Records Management

Entitlements

Civil registration

PUBLIC WORKS & SERVICES

Environmental Protection

Parks & recreation

Education

Health & Human services

EMERGENCY SERVICES

Response team dispatch

Post-incident reporting

Shift scheduling

DEFENSE

Budget planning

Personnel classification & assignment

Asset Lifecycle Management

Here's how some of the processes in public sector agencies can be automated and optimized.

From filling in tax rebate forms to paying for a parking ticket, almost every process will involve forms, documents, and information that must be presented to citizens. Unfortunately, these processes are often conducted manually and are highly inefficient. These inefficiencies result in delays when delivering results to citizens.

GOVERNMENT ADMINISTRATION

License Applications: offer park and recreation permits and licensing digitally, removing the need to print, sign, or submit paper forms.

Civil Registration: allow members of the public to lodge births, deaths, and marriage registrations online to remove time-consuming in-person visits.

PUBLIC WORKS & SERVICES

Landmark Preservation: modernize submissions and reviews of landmarks to reduce delays on development and preservation projects.

Citizen Response Management: improve responsiveness to written citizen requests and communications with auto-generated responses that are routed for approval.

EMERGENCY SERVICES

Shift Scheduling: plan emergency team scheduling around leave, ensuring that skilled and experienced professionals are always on hand.

Post-Incident Reporting: automatically triage incidents to accelerate response times and save time on post-event reporting with on-field data collection.

DEFENSE

Compliance: automate the distribution of content and communications, ensuring it follows any and all procedural processes.

Recruitment: reduce recruitment cycles from months to days with streamlined processes including the automation of background checks.

When it comes to suppliers, the problems are a little more universal. A lack of communication and delays between the government agency and the supplier are the primary causes for concern. The process of a supplier chasing invoices to be paid is a good example.

Having your invoice heard

An IT consultancy is working on a project in a government department over the course of three years. At the end of every milestone (quarterly, for instance), the consultancy delivers an invoice. Normally, the process of paying the invoice is simple enough:

- The finance team within the government agency reviews the invoice.

- The invoice is checked for accuracy against all statements of work and contracts pertaining to the project and the time period involved.

- If the services rendered are agreed to be the same as those invoiced for, the agency will pay the bill.

- Alternatively, if there seems to be a disparity, they can raise this with the supplier.

But because the process is conducted manually, it can rapidly break down and cause frustration and distrust for the supplier:

- The government agency's finance team cannot find evidence of contracts for work quoted on the invoice and so raise them as disputes.

- The supplier may provide evidence of their own, which appears to come from the government agency, yet the contracts have not been filled in correctly and have never been seen previously by the finance department.

- This leads to a standoff between the parties and potentially even legal action.

This kind of experience can damage trust with suppliers, making them less likely to conduct work with the agency again. Using process automation technologies, government agencies can streamline processes both inside and outside the organization – avoiding situations such as this.

Improving how government work gets done

Process automation is a collection of technologies that can enable a more intelligent and streamlined way of conducting work. Organizations can analyze the business processes they are performing to see where improvements can be made. Highlighting processes that are inefficient or broken, workers can automate sending emails, creating new documents, or getting sign-off for approval.

The Process Automation technology stack

› **Process Mapping**

› **Workflow; Robotic Process Automation; Document Generation**

› **Process Intelligence**

There is ample potential for process automation in the public sector. Document generation is a strong example.

Government employees can often find themselves repeating manual tasks related to the creation of documents and data capture. This can result in errors, confusion, and frustration. Document generation software can quickly and easily generate formatted and re-usable documents and is designed to work with whichever technology your business uses:

› Customer relationship management (CRM) platform

› Enterprise resource planning (ERP) platform

› Case management system

› Financial system

Whenever a document is created—from tickets to invoices to contracts or order forms—sophisticated document generation allows them to automate the whole process without ever having to leave their system of record.

When a new contract arrives from a citizen or supplier, all information is registered in the system of record. Government employees don't have to navigate between different tools to complete their tasks or worry about compliance. All the information is instantly available.

Employees can use document automation to create standardized documents and trigger workflows pertaining to them, all from within their existing system. This means the audit trail is entirely transparent. Supplier contracts and citizen requests are logged in a central location—making all interactions consistent and compliant.

By using these tools, the process of ensuring an invoice is paid in a timely manner becomes much smoother.

- Every time a new work agreement is made between the agency and the contracting company, the contract can be generated in the financial system.

- This creates a consistent and transparent trail of digital contracts, with all information entered correctly.

- When reviewing the invoice for payment, the finance department can use document automation to automatically bring together all the data related to that vendor from systems of record and review what has been agreed and compare this to the invoice request.

- Instantly, the procurement process becomes totally transparent and any disparities or disputes easily can be resolved.

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Reality requires more

Even when integrated with their existing systems of record like Salesforce, organizations cannot simply create custom-built, automated versions of their processes and expect to find success. There are several steps to take to prepare processes for rollout to teams, departments, and business-wide and for the tangible benefits to be realized.

Businesses must first look to analyze their processes, identifying broken ones that must be fixed and those that can benefit the most from being automated. They must acknowledge the current IT landscape so processes can be changed without disrupting the underlying technology. They need to make any change clear and understandable if the new processes are going to be properly adopted.

The right technology can make these steps easier, but you must instill a legitimate commitment to change for processes to evolve and the business to adapt.

Paying supplier invoices

By capturing data and automatically generating documents that contain this data, government employees can significantly accelerate their interactions with suppliers and members of the public. Problems are resolved faster; requests are responded to and decisions made more efficiently. In turn, employees are more productive, which reduces backlogs and can ultimately provide citizens and suppliers with a better experience.

Through process mapping—another important element to process automation—agencies can map and manage the processes used across the organization to increase collaboration, visibility and accountability. Supplier invoicing processes can be managed easily, with defined actionable steps blocking out the process from start to finish.

1. **The form is submitted as a paper copy or web-based form**

2. **A case is created in the ERP or financial system of record**

3. **The information regarding the invoice is automatically reviewed and validated**

4. **The invoice is generated with the correct information using document generation.**

While document generation will ensure that documents are created consistently with up-to-date information, process mapping ensures that processes properly document and followed. With process mapping, users can smoothly manage documents like invoices end to end.

The flexibility and capabilities of technology stacks are crucial as government agencies evolve workflows beyond invoices to almost any business process or technology environment. So, an agency working with Dynamics CRM and OneDrive for Business could automate their processes just as easily as one using Salesforce and Box. It puts the power of automation into the hands of any agency and individual working in the public sector.

In the following section, we explore how one government organization in San Francisco made use of Nintex technology to improve the experience for their suppliers and members of the public.

Powering transport for the citizens of San Francisco

The San Francisco Municipal Transportation Agency (SMFTA) handles all transportation matters in the San Francisco area, including bus lines, bicycling, parking, and the Municipal Railway (MUNI) among others.

Virdis Gamble, Productivity Services Manager, works in the Technology Solutions and Integration (TSI) department at SFMTA. Virdis is responsible for solving technical problems employees have within the agency and finding solutions to help improve productivity. That productivity extends to business processes—improving them to make day-to-day work easier for SFMTA employees.

The TSI department at SFMTA use Nintex workflows and forms to improve various internal and external processes.

One of the first projects involved automating the supply chain processes to deliver a steady supply of materials from external vendors and contractors. The TSI department needed to automate the supply chain processes as they were previously managed manually through email, resulting in a complex and time-consuming processes. As a result important stakeholders were left out of conversations by mistake, communication threads risked dropping off without warning and important items would sometimes go missing—all creating problems and delays. The SFMTA used Nintex to ensure that every process and task assigned was trackable, so contractors could be held accountable for the work they were doing.

Extending capabilities

SFMTA initially deployed Nintex within the TSI department, but Nintex now supports the rest of the agency with automation solutions. This has taken on many forms:

HR ALTERNATIVE WORK SCHEDULE REQUEST

SFMTA allows employees the option to choose to work four 10 hour days a week, instead of the traditional five 8-hour days. Employees have the option to work an alternative schedule, which requires completing and submitting a form to HR for approval. Using Nintex Forms and Workflow, the agency digitized and automated this process. Now once an employee completes and submits the form, it's routed to their manager for approval, then to the HR director for final approval, and stored in SharePoint.

E-RETURN TO WORK

When drivers go out on leave for an extended period (long-term disability, family, or medical leave, etc.) they must be medically cleared through San Francisco General Hospital before they can return to work. Before Nintex this process involved drivers completing a myriad of paper forms that would need to be physically turned into different departments across offices.

VIDEO SURVEILLANCE UNIT

SFMTA vehicles (Rail and Bus) record video surveillance while they are in operation and the agency often receives requests from the police, riders, and other bodies for copies of surveillance footage. Historically, the requests were tracked using paper forms and each request was followed with the manual process of finding the appropriate video, burning it onto DVD, and sending it to the requester. By automating the process with Nintex, requests are dealt with much faster and are trackable.

Putting a positive experience at the heart of interactions with citizens and suppliers

Government agencies play a huge role in improving the lives of citizens through the delivery of essential services. Equally, they work closely with private sector suppliers to further enhance services for their citizens. Many government agencies provide a great service, yet there is still a long way to go to improving the customer experience.

Providing a positive experience is not only a sensible thing to do in terms of saving time and money and cutting waste. Ultimately, it's about improving confidence in the public sector.

Government agencies should start by developing ways to improve how they work with citizens and suppliers; improving the processes linked to delivery of services. Process automation plays a major role in boosting efficiency and accelerating the speed at which these activities are completed.

Automation has the capability to truly change the public sector, enabling government employees to be more productive, improve the customer/citizen experience and get a greater sense of achievement from their work. Combined with process mapping, document automation, and workflow tools obstacles which are inherent with paper-based, manual processes can be removed to empower government agencies to deliver better outcomes to citizens and suppliers, faster.

To learn more about how government agencies are using these technology tools and strategies to improve the customer and supplier experience, visit
www.nintex.com/state-and-local-government

About Nintex

Nintex, the trusted global standard for process management and automation, enables both IT and BDMs to more quickly and easily create and manage simple to sophisticated business processes from back to front-office. More than 8,000 customers in 90 countries turn to Nintex's workflow automation platform to drive productivity and accelerate business results. We have the fastest way to build applications, lowest total cost of ownership, and the highest overall satisfaction among our peers.

In 2018, Microsoft awarded Nintex Workflow for Office 365 with Best Overall App and Nintex Forms for Office 365 with Most Business Value. Nintex also won Microsoft Office and SharePoint Application Partner of the Year award.

We welcome the opportunity to discuss your business needs and demonstrate our unique approach to workflow automation. We are happy to offer the following services:

- A business requirements discussion with one of our workflow experts and our partners
- Solution demos and proof of concepts tailored to your requirements
- A comprehensive response to your RFI/RFP
- Customer testimonials

Learn more at **www.nintex.com**

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