

Automating and Accelerating the Constituent Experience

Eliminating manual tasks makes life easier for the public and the government employees who serve them

For far too long, accessing government services has boiled down to a constituent filling out a paper form — and then waiting and wondering. But new process automation platforms empower governments to overcome paper-driven delays while bringing their constituents clarity and transparency on the status of grant applications and other intricate agency functions.

This brief from the Center for Digital Government explains how process automation platforms can help agency leaders narrow the timelines for complex operations and ease the workload on their hard-pressed staff.

Automation in Action: Transforming a Grant Application

Automation platforms make government interactions less cumbersome and more productive. A grant application for COVID-19 local business relief illustrates the technology's potential.

The problem. A county government had to quickly deliver emergency grants to local businesses that lost income during the pandemic. Paper-based, manual processes dragged out much-needed fund distributions.

The solution. The county partnered with Laserfiche, a global enterprise software provider, for document management and business process automation to accelerate the grant-approval process and help desperate business owners. Before these changes were made, the grant process took up to three weeks.

"We were able to get the processing time from application to funds distribution down to only three days," recalled Allison Young, senior director with Laserfiche, in a recent webinar hosted by the software vendor.

How it Worked. In the webinar, Young used her company's automation platform to demonstrate the steps required to automate and simplify the grant approval process. These steps included

creating a form for businesses to enter their location, demographic information and financial impact from the pandemic. Laserfiche helped the agency develop a scoring system based on familiar Microsoft Excel formulas that automatically calculated COVID-related losses. Businesses with the highest scores could then be eligible for the most funding.

Background processes used API calls (requests for information sent to a server) to an Internal Revenue Service database to validate the company's existence. A mapping application was used to locate the business address.

"We needed to know what district that business was tied to," Young explained. This was required to ensure aid was distributed equitably across the county's districts.

After the applicant entered the necessary data, the automated system sent the application and its score to the people responsible for approvals. They could see all the relevant data and quickly decide the funding total. Checks and balances were built in to give county staff the final say on distributions and to avoid accidental refusals. Payments were sent out automatically by check or direct deposit. Finally, all documents created during the process went into a repository that had been indexed to make it searchable.

Because the software and forms are hosted in the cloud, staff can access the system through any web-enabled device. "And we can now run reports and analytics on how long each step in the process took," Young said. Thus, the automation platform gives leaders insights into making the process even more efficient in the future.

Challenges for Implementing an Automation Platform

Agencies have accumulated decades of manual processes that present vast automation opportunities. For instance, when a developer applying for a zoning variance calls an agency to find out the status of her application, she's taking time away from essential business activities.

Meanwhile, every phone call from a constituent pulls agency staff from other tasks. Simply creating an automated notifications

process that keeps everyone apprised of an application's status can save significant time for agency staff and the public.

Almost any department in a public agency, from law enforcement to tax collection, can benefit from automation. But agency leaders must keep a few points in mind when they're choosing an automation platform:

Data and analytics are pivotal. Automated, digital processes generate mounds of useful data. With a robust automation platform, agencies can synthesize data from multiple sources and use reporting tools to discover the implications of newly digitized processes.

"We can't see the full picture all the time," says Noel Loughrin, strategic solutions manager with Laserfiche. "Our brains just aren't built to do that type of analysis on the fly."

Analytics tools help agency staff visualize the value of automation. "You can track your business processes to gain an understanding on how they're progressing, find bottlenecks and gain insights on optimizing processes," Loughrin says.

Human decision-making cannot be automated. While automation can accelerate processes and improve efficiency, technology is no substitute for human discretion and judgment.

Agency staff must retain the final say in automated processes. A well-designed automation platform takes this into account, creating notifications and workflows that produce more timely decisions.

"The human element of these processes and applications is still very much built in," Loughrin says. "The platform just eases the administrative burden of following up and making sure things are done in a timely manner. And communication is seamless."

Digitizing manual processes is not enough. Rather than starting by finding digital equivalents of analog actions, agencies should thoroughly analyze business processes first. Agencies may need to adjust or re-engineer processes to get the most out of an automation platform and drive genuine productivity improvements.

Best Practices for Success with Process Automation

Successfully implementing a process automation platform has three components:

Personnel. People must be trained to use new software and encouraged to adopt it. This includes leaders, agency staff and public users. "Work with your internal teams to see where they're struggling," Loughrin advises. Their struggles will often point to opportunities. Automating processes that eliminate their roadblocks and demonstrating how the new process does so will make it easier to encourage adoption of a new system.

Processes. Agencies must fully understand the steps in the processes they hope to automate, ensuring the automation platform provides data-driven insights and improves visibility and transparency for users. "Once you figure out those issues, then you have to prioritize what processes are going to do the most good first," Loughrin says.

Software. Applications must be easy to use, relying on tools like low-code/no-code apps that allow new features to be added quickly and easily with minimal technical acumen. Controls should be built in to discourage cybercrime and protect sensitive data.

Ultimately, the software solution should help agencies break down data silos and act on the automation opportunities that arise. Don't try to automate everything at once. Instead, use pilot projects to figure out what works best for your organization.

Easier Processes for All

Loughrin advises agencies to stay focused on what's coming next in terms of new capabilities. For instance, robotic process automation bots can detect a water main leak and trigger an alarm that dispatches repair crews to the scene fast enough to limit property damage.

Agencies can also boost self-service options for the public, letting them use government services whenever they choose. "You can make them feel more comfortable with their government because there's more transparency and communication, and it doesn't have to happen on government's time," Loughrin says. "It can happen on your constituents' time."

There's no need for agency processes to be fraught with delays, confusion and aggravation. A process automation platform can help agencies simplify and accelerate their most elaborate functions, giving time back to their staff and streamlining interactions with the public.

This piece was written and produced by the Center for Digital Government Content Studio, with information and input from Laserfiche.



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