

Checklist: how to make your case for a new government workflow solution



The wheels of government can move slowly, and one of the clearest examples is the amount of paper that still inundates agency offices. Intra-office memos are printed, put in envelopes and hand-delivered to colleagues down the hall. Employees travel miles and miles to get someone's signature—and then drive the signed document back to the office. And these are just some examples.

You may know that your agency needs a workflow upgrade, but how can you fix it? What options are available? How can you convince leadership that, hey, we really need to spend money on a solution?

DocuSign created this checklist to give you step-by-step instructions on making your business case for a workflow solution. Read on to start your journey.



Leaving paper behind



Step 1 Identify your priorities

Not all problems are created equal, so your first step is to identify your greatest workflow trouble spots. What procedures cause the most slowdowns and angst? Consider which systems have:

- The most approval delays
- The longest approval delays
- The most customer complaints
- The most forms to complete
- The most time-consuming delays
- The most fraud or security risks



Are you involving the right people in your plans? Senior leadership is great, but should they be the only ones at the table? Consider getting input from program managers who operationalize and execute the processes, as well as leadership across all departments that the process impacts, such as legal, IT, HR and procurement.

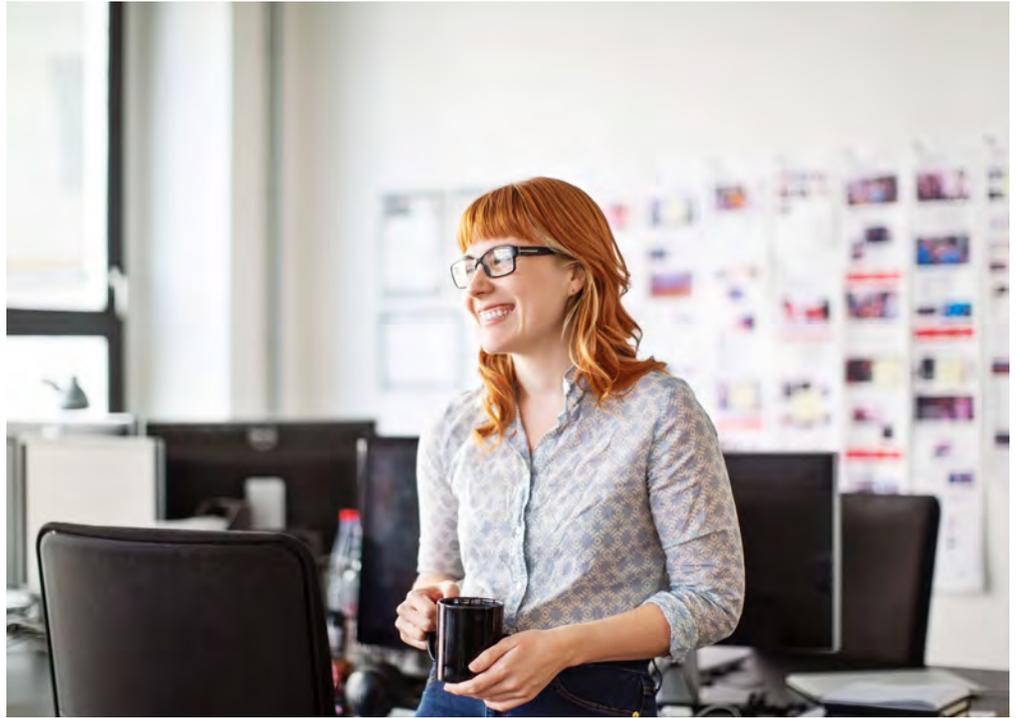
Step 2 Create a plan

You can't overcome a problem until you understand its root causes. So now that you've identified your priority issues, look at why they exist in the first place. Consider:

- Which function is responsible for execution
- How each step contributes to the final outcome
- Where the process moves from one internal department to another
- Where and when data is added and vetted
- Where regulatory or legal requirements apply

As you develop your plan to fix the problem, ask yourself:

- How much money is needed for the change?
- What risks (e.g., retraining) are involved?
- What could the agency do if the investment is made?
- What problems will occur if the investment is overlooked?
- Who would benefit most from the solution?



Step 3

Explain the tangible benefits

Streamlined workflows offer tangible benefits—so highlight the expected outcomes when making your business case. Here are five of the most significant returns on investment (ROI), with success stories from agencies like yours.

Give citizens and staff the speed and convenience of doing business digitally

1

Faster turnaround time

Missouri's Rehabilitation Services for the Blind (RSB) has a big job: connecting blind and visually impaired citizens with the services they need to succeed personally and professionally. In the past, RSB relied on in-person contact to deliver services—and staff even traveled to people's homes to help them complete paper forms. It was a slow process, and the pandemic made it impossible anyway.

The Solution:

The agency switched to an electronic-signature (e-signature) system that supports technology for the visually impaired, such as screen readers, high-contrast tools and keyboard-only inputs. The system reads the various forms and documents aloud—no need for humans or braille versions—and allows customers to “sign” them on their own. Turnaround times have plummeted, and the blind and visually impaired are better served.

Save money by eliminating paper and inefficient time-consuming workflows

2

Hard cost savings

The Spring Branch Independent School District (SBISD) near Houston has 35,000 students and 46 campuses and solicits more than 400 RFPs annually. Until recently, it had a paper-based procurement system that was decentralized, susceptible to compliance risk, slow, and allowed for runaway, maverick spending.

The Solution:

The agency switched to a digital-first procurement system that's saved \$4 million. Vendor registrations, proposals and master service agreements are vastly easier to track, and by eliminating numerous manual steps, SBISD now completes contracts in under two days (it used to take weeks).

Eliminate manual and redundant tasks so employees can focus more on strategic work

3

Greater employee productivity

The Butte County District Attorney's Office in California needed a better way to secure search warrants. The usual process required law enforcement to drive to a judge's location (sometimes at home in the middle of the night) to get the judge's signature on a paper form. It was a slow, laborious system that pulled officers away from crime scenes and other policing in order to handle administrative tasks.

The Solution:

The agency switched to an e-signature system and gave each judge an iPad so they can read and sign warrants from anywhere. The time to process a warrant has dropped from hours to minutes, and more officers are available to report to crime scenes. Plus, the secure e-signature system gives the DA's office an audit trail, proving that signatures are valid.

Decrease the number of process errors due to incorrect or missing information

4

Fewer errors

The New Mexico Educational Retirement Board (NMERB) serves more than 160,000 members and retirees and processes nearly 300,000 customer documents each year. In the past, it took at least two weeks for a document—say, a retirement application—to go from the member to the employer and then back to the NMERB, which then processed and scanned the forms for digital recordkeeping. There was an extremely high human error rate: 70% of some forms were returned to members because they had incorrect or missing information.

The Solution:

The agency switched to an e-signature system that has greatly reduced errors and shortened turnaround times. Now, to submit their "paperwork," people click on a link to an online form and are guided through a quick, automated process. The new workflow system was up-and-running in six weeks, and NMERB is digitizing eight other processes.

Seamlessly integrate with 350+ prebuilt integrations to achieve faster value

5

Shortened implementation time

The San Antonio Housing Authority (SAHA) provides housing assistance to roughly 65,000 low-income residents in thousands of properties across the city. It had used disparate, paper-based, outdated systems to sign and track agreements, and because forms often are hundreds of pages long, SAHA staff literally wheeled them from office to office for signatures. Delays were common.

The Solution:

The agency switched to a cloud solution that integrated seamlessly with the agency's new cloud-based technology—for SAHA, compatibility was non-negotiable. People now can approve documents on any device in any location, and that gives administrative staff real-time insight into a document's status. Implementation time has dropped from three weeks to two days.

Conclusion

You don't need to plan and make your business case alone. DocuSign partners with agencies like yours to identify workflow problem areas, develop tailored solutions and help secure approvals. Change doesn't have to be a matter of chance.

Contact [DocuSign](#) today to schedule a workshop with your team to build your business case for implementing a new workflow solution.

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

DocuSign, Inc.
221 Main Street, Suite 1550
San Francisco, CA 94105

[docuSign.com](#)

For more information
sales@docuSign.com
+1-877-720-2040

DocuSign®