WorkDynamics
Document Management Platform

BUSINESS GUIDE

4 Ways

Document & Correspondence Management Technology Can Maximize Lean Governments

Day after day across the globe, local and state/provincial governments are looking for ways to balance budgets while also simultaneously stimulating innovation. But perhaps unsurprisingly, being asked to "do more with less" is a major challenge for these organizations—particularly as citizens' demand for delivery of governmental services increase.

Making the situation even more challenging, as governments around the world have responded to the COVID-19 pandemic, public trust has wavered. In fact, according to the Edelman Trust Barometer, the majority of 27 countries surveyed say they trust businesses more than their own government—referring to public sector agencies as "less competent" than their corporate counterparts.

Enter Lean Government

Now we are seeing fundamental changes in how the public sector operates, culminating in the emergence of "lean government." As an improvement philosophy, being "lean" is about eliminating non-value-added activity or "waste"—essentially finding and implementing new methods to reduce the complexity of business operations, by streamlining structures and processes.

By identifying and removing unnecessary process steps and activities, government agencies not only gain better transparency into how their processes work—they can make modifications to ensure those processes function smoothly and consistently, thereby improving interactions with citizens and stakeholders.

In fact, thanks to a surge of innovative solutions today—specifically document management technology for enabling more intelligent workflow of all correspondence—the public service can indeed do more with less.

"Governments' increasing reliance on digital technologies for day-to-day business generates huge amounts of data. From emails to spreadsheets to teleconference presentations, organizations create countless megabytes of data that must be filtered and saved. As the volume of data grows, so too does government's need for technologies and policies that can generate valuable insights from it."

—Deloitte

Inefficiencies in Government:
How "Waste" Leads to DOWNTIME

Within governmental departments, "waste" often refers to inefficiencies associated with:

➡ The collection, use and management of information,

➡ The design and implementation of work processes, and

➡ Individuals' effectiveness on the job.

What are all these inefficiencies caused by? According to experts, eight primary instances of waste exist within an organization's administrative and service processes (which spell out the acronym DOWNTIME):

- **Defects**—Such as data errors and missing information
- **Overproduction**—Including doing work that has not been requested, and producing too much information that ultimately overwhelms the recipient
- **Waiting**—Time wasted waiting for the previous step in the process to be completed
- **Non-utilized talent—**Referring to employees who are not effectively engaged in the process
- **Transportation**—Moving items or information from one location to another, when it is not required to perform the process
- **Inventory**—Any excess materials or information that are not being processed, creating a backlog of work
- **Motion**—When people, information or equipment make unnecessary movements whether due to workspace layout, ergonomic issues, or searching for misplaced items
- **Extra processing**—Performing any activity that is not required to produce a functioning document, report, or service

Thankfully, by taking a lean approach—one that improves the transparency, speed and quality of business processes related to documents and information—government agencies can effectively reduce and even eliminate many of the root causes of waste that have traditionally plagued them.

And that's where document management—aka correspondence management—technology comes in.

The potential for local and state/provincial governments

At its most basic, this software solution makes the overall management of all pertinent business files seamless, efficient, and easy—regardless of process, location or device.

But more specifically, an intelligent document management platform helps capture, digitalize and automate all critical documents within an organization—essentially tying them together in a transparent way, even across separate departments and disparate systems, while also:

- Providing document security and access control
- Enabling tagging and approving tasks
- Auditing trails
- Streamlining search and retrieval, and
- Facilitating the completion of tasks related to all documents within the system.

The following pages provide examples of how correspondence management technology can specifically assist governments in automating workflows, managing cases and correspondence, and enabling compliance and reporting—leading to the creation, maintenance and optimization of a lean operation.

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Workflow Automation
& Tracking

The challenge
Today's information landscape, characterized by rapidly growing amounts of digital and printed information, requires organizations to find innovative and user-friendly options for managing, storing and accessing that data.

Meanwhile, increasingly rigid privacy and security requirements are putting additional pressure on agencies to keep citizen information safe. Compliance has become ever-more critical since the emergence of the COVID-19 pandemic, which resulted in more employees working from home. Protecting data effectively can be complicated by the fact that information is stored and accessed in a variety of ways.

Transforming workflows for a leaner government
From receiving general inquiries, to coordinating applications for licenses and permits, to maintaining a space for meeting agendas and minutes, a document management platform can provide the foundation to integrate and streamline a broad collection of documents across disparate workflows.

Ultimately, this kind of technology can implement a strong workflow management governance approach that complies with requirements related to privacy and security of information—while also providing strong search and reporting functionality plus enabling tracking and managing of multiple business activities under one platform.

> According to McKinsey, about 45% of work tasks could be automated using already demonstrated technology—which could certainly apply to the many repetitive and/or long-chain workflows found in government.

Common applications in government:

- ➡ Government department and parliamentary communications
- ➡ Access to Information request processing
- ➡ Office tasking systems
- ➡ Enterprise department Q&As

- ➡ Activity tracking system
- ➡ Help desk solutions
- ➡ Portfolio appointments management system
- ➡ Internal office collaboration and management

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Correspondence Management

The challenge

From emails and letters to faxes, invoices and more, the ever-increasing number of correspondence channels is central to government agencies' everyday tasks. However, properly tracking and responding in a timely fashion to each piece of correspondence can be an incredible challenge.

The moment a single correspondence is received, it requires an appropriate action—whether that necessitates sending a reply, redirecting it within the organization, or storing it in archive. The manner in which these communications are managed can directly affects an organization's ability to effectively service its citizens and stakeholders. As such, correspondence management is of paramount importance for all government departments and agencies seeking the highest possible level of productivity amidst multiple deadlines.

Streamlining the journey from receipt, to response, to archive

A correspondence management solution can empower organizations to manage the entirety of the correspondence journey—from ingestion to assignment and analysis, through to end-user responses and more—all in a single, highly intelligent platform.

Regardless of how the correspondence is received—whether by email, physical mail, website forms, phone, or something else—users can successfully manage the complete lifecycle of all individual correspondence, plus benefit from in-depth business intelligence reports on all enquiries made to any department, along with action items, and more.

> **"Most of the organizations pertaining to government and public sector lose hundreds of daily interactions. Moreover, they fail to follow up on critical communications. Hence, government and public organizations are moving toward an efficient correspondence management system to streamline the complete lifecycle of correspondences."**
>
> —ResearchandMarkets.com
>
> https://www.globenewswire.com/en/news-release/2021/07/13/2261737/28124/en/Global-Correspondence-Management-System-Market-2021-to-2026-Growth-Trends-COVID-19-Impact-and-Forecasts.html

Common applications in government:

➡ Ministerial correspondence

➡ Office management

➡ City clerk's office

➡ Briefing notes

➡ City official correspondence

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Case Management

The challenge
Put simply, case management is all about taking a case—for example, a complaint, ticket, or information request—from start to finish, with as few blind spots as possible.

However, doing so is difficult when this content-intensive process is unstructured. Without a process in place to enable collaboration regarding assessments, plans, and evaluations—or manage collaboration across disparate offices and dispersed teams— this impedes governmental organizations' ability to effectively coordinate to meet individuals' unique needs.

Easing the collaborative aspect of case management
By providing greater transparency into cases, a fully digital solution can help eliminate those data and document complexities. This more intelligent manner of collecting and managing information through a single platform simplifies the way users interact with people including clients, constituents, and the general public.

Moreover, with robust case-file management functionality, users can track, interact with and run detailed reports, as well as create statistical reports to assist in managing any type of case and subsequent caseloads.

Consequently, technology to manage correspondence can significantly shorten timeframes when it comes to receiving, recording, and responding to individual cases— leading to improved customer/citizen satisfaction.

Common applications in government:

➡ Complaints management
➡ Ombudsman office
➡ Information commissioner
➡ Contract management
➡ Issues tracking

➡ Privacy commissioner
➡ Information request processing
➡ Client service feedback requests
➡ Incident tracking

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Compliance, Reporting & Enforcement

The challenge
Proper document management can be especially challenging for governments when compliance comes into play. Without the ability to adhere to regulations pertaining to data—such as, for example, ensuring secure access to confidential personal information —organizations place themselves at risk of financial losses, security breaches, license revocations, disruptions in operations, erosion of citizen trust, and more.

Moreover, the inability to garner actionable insight into the location, security, and management of data and subsequent communications can greatly increase that risk level.

Facilitating the act of governance with one platform
An intelligent document management solution that provides seamless workflow creation, enhanced management and reporting, leading-edge security and more can make compliance, reporting and even enforcement easy. With sophisticated data controls including ingest and secured storage, government organizations can fully and confidently embrace all aspects of digital transformation initiatives without the added concern of non-compliance. Best of all, users can securely implement new and exciting applications to address any type of internal or external workflow involving disparate data.

One example could involve using such a platform as a bylaws catalogue—essentially combining legislation and respective penalties within the system so that when a user selects an offence, the solution provides the full text of legislation and penalties to be applied. As such, with greater access to pertinent information, a bylaw office could better serve its citizens and stakeholders, while also improving enforcement.

Common applications in government:

➡ Ombudsman office
➡ Bylaw management
➡ Policy management

➡ Asset reporting
➡ Customer service and complaints
➡ Licensing and permitting

Lean-enabling Features in Document Management: What to Look for in a Solution

Governmental organizations seeking to reduce process inefficiencies should look for platforms that include key features in alignment with the ideal characteristics of Lean government approaches, as listed below:

Ideal Characteristics of Lean Government Approaches	Key Features To Look for in a Document Management / Correspondence Management Solution
Uses a customer service perspective to optimize value delivered to the public and other stakeholders	• **Continual insight:** Out-of-the-box notification functionality or custom functionality ensures deadlines are being met • **Accessibility:** Comprehensive WCAG, AODA and 508 compliance for the visually impaired, built into the platform
Involves employees and stakeholders in continual improvements and problem-solving	• **No-code customization:** No level of coding expertise required, so employees can easily make updates themselves • **Un-siloed workflows:** Employees can create, maintain and improve organizational-standard workflows to streamline management, collaboration, tracking, and more
Reduces complexity of processes and variation in process outputs	• **Seamless integration:** Ensuring the platform will leverage business systems of all kinds—including CRMs, ERPs, document storage platforms, and more • **Effortless ingestion and routing of all document types:** From paper-based to digital information, enabling captured records and attachments to be forwarded via predefined processes to the appropriate person or group • **Controlled access to content:** Easily assign rights to any level of user to continually ensure security and compliance
Use performance metrics and visual controls to provide rapid feedback to improve real-time decision-making and problem solving	• **BI and analytics:** Continual visibility of document status including transparency, user accountability, scheduling, management and more through a single pane of glass • **Auditing and reporting:** Every system action is recorded and time-stamped for end users and administrators to review at any time

Optimizing your government operation is not as complex as it may seem

The lifeblood of digital society is data—and the public sector has lots of it. But that doesn't mean managing it needs to be time- or resource-intensive. Not with the right intelligent correspondence management solution.

Used effectively, document management technology can optimize governments to become leaner by streamlining workflows and process for handling requests—thereby simplifying the delivery of public services to citizens in need.

It is indeed possible for governments to "do more with less" and be innovative while also thinking lean, removing inefficiencies, and significantly increasing productivity. Are you ready to start your digital transformation journey with WorkDynamics? Contact us today.

SPEAK TO AN EXPERT

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