ACUMEN SOLUTIONS GOVERNMENT AGENCY

NUCLEUS RESEARCH

ANALYSTS
Rebecca Wettemann, Barbara Peck

THE BOTTOM LINE

A federal agency engaged Acumen Solutions to implement a correspondence management system built on the Salesforce platform that supported multiple channels for constituent and interagency communications. Nucleus found that the project enabled the agency to replace an aging system and modernize its communications processes, reducing technology costs while driving greater user productivity and improved service to citizens.

ROI: **72%**
Payback: **1.3 years**
Average annual benefit: **$1,403,959**

• • •

THE COMPANY

The agency profiled in this case provides essential services to American citizens through collaboration with various public and private entities. The agency coordinates with its internal divisions to provide these services.

THE CHALLENGE

The agency receives numerous daily correspondence through a variety of methods including through e-mail, by phone, and by mail. The agency's correspondence management department identified the need to streamline the segmentation, review, and response processes for all correspondence.

Each piece of correspondence becomes a "case" that requires analysis and a response. Compelling issues, such as various national emergencies, require immediate attention by the appropriate party. Previously, each piece of correspondence was logged manually onto an application, exported to a spreadsheet, and finally delivered to the designated receiver.

Cost : Benefit Ratio | **1 : 1.6**

The legacy system used to handle correspondence was more than 10 years old. The volume of correspondence had grown over time and a new administration had expanded the reporting requirements. As a result, the agency decided to replace the legacy system with a more modern solution with increased functionality that could scale and provide the flexibility it needed while meeting its reporting requirements.

THE STRATEGY

Several market options were evaluated and Acumen Solutions, with its Salesforce-based solution, was chosen as the consulting partner to implement a correspondence management solution for the following reasons:

- Track record. Acumen Solutions had successfully built numerous mission-critical applications for federal agencies on the Salesforce platform, including correspondence management solutions for several other federal agencies. The agency knew it could take advantage of Acumen Solutions's subject matter expertise with both Salesforce and correspondence management and the ability to re-use existing code and data models.

- The agency prepared an RFP to find the best combined software and services solution to meet its correspondence management requirements. The Acumen Solutions-Salesforce solution was selected as the best value for expenses at the highest quality available.

- Efficient data migration. Acumen Solutions was able to demonstrate, based on past performance, that it could successfully work with a legacy vendor to extract the data and utilize a 2-point authentication process to verify the data migration and ensure a successful upload of data to the new application.

TYPES OF BENEFITS

Direct 28%   72% Indirect

The project was initiated in December 2014 and went live in March 2015. In the initial stages, a core team of eight people from the correspondence management team spent 100 percent of their time and five staff members spent 20 percent of their time for the 3-month period. They worked in conjunction with 20 members of the Chief Information Officer's office who dedicated 20 percent of their time to meet the strict time allocation.

Acumen Solutions provided implementation and training support for each user of the application. More than 200 baseline users were trained initially and 50 "super users" received additional, specialized training. Ongoing customization continues, enabling greater functionality and usability.

CUMULATIVE NET BENEFIT

1,618,065

575,716

(283,221)

Year 1   Year 2   Year 3
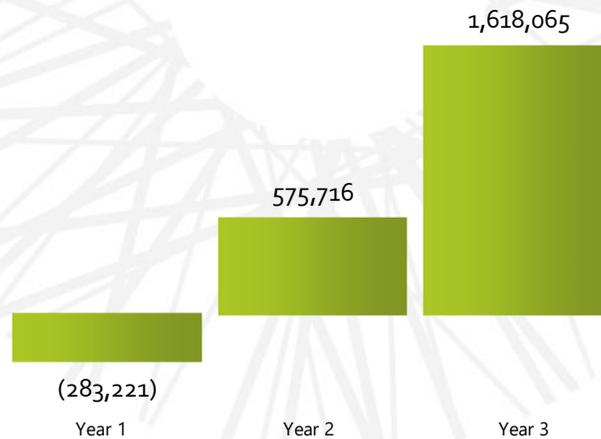
KEY BENEFIT AREAS

Moving to a new correspondence management system based on the Salesforce platform enabled the agency to modernize its communication and correspondence processes while meeting the recordkeeping and auditing requirements of the government. Key benefits of the project include:

- Improved technology management. The new solution eliminated the ongoing costs of the maintenance fees and additional contractor expenses to support the aging legacy system. The agency also avoided a one-time upgrade expense that would have been necessary without the move to the new application.

- Avoided additional contractor expense. The reporting and management capabilities within the new solution enabled the agency to avoid hiring additional contractors that would have been needed to keep up with new reporting requirements had it stayed with the legacy system.

- Increased productivity. Previously a case was transferred from the legacy system to a shared spreadsheet that was updated manually. Now that process is automated, driving productivity increases for both correspondence managers (by an average of 30 percent) and general staff (by an average of 2 percent) using the application.

- Flexibility. The flexibility of the solution enables correspondence managers to rapidly respond to new issues and changes and rapidly create the reports needed to monitor them without IT intervention.

- Greater visibility and improved citizen service. The accessibility of the new system, the ability to address arising issues quickly, and the usability of reporting has enabled the agency to accelerate response times and improve both interagency communications and citizen service.

KEY COST AREAS

Costs of the project included annual software license subscription fees, consulting costs, and the personnel time to implement and support the application. The cost calculation also included the cost of employee training time for the policy coordinators, document management group, and gatekeepers that manage the flow of information.

BEST PRACTICES

Re-use of proven software applications for common agency-wide processes such as correspondence management can both accelerate the time to value and reduce the risk associated with an implementation. The selection of Acumen Solutions, an experienced Salesforce implementation vendor with the ability to re-use portions of successful applications at other agencies, enabled the agency to leverage the industry and process expertise and data models to meet its rapid timeline while

ensuring it would have the flexibility to upgrade and change the application as needed over time to maximize value.

NET CASH FLOWS

1,117,620

858,937

1,042,349

(1,400,841)

Initial   Year 1   Year 2   Year 3
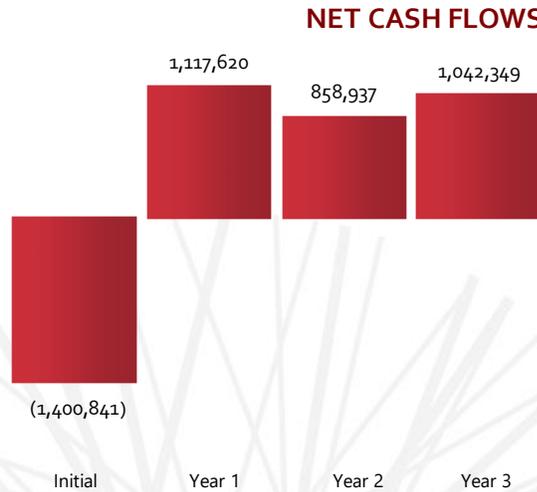
CALCULATING THE ROI

Nucleus quantified the initial and ongoing costs of consulting, annual software subscription costs, personnel time to implement and support the application, and employee training time to calculate the agency's total investment in the solution.

Direct benefits quantified included eliminated costs associated with maintaining and supporting the legacy application as well as avoidance of additional contractors that would have been needed to meet reporting requirements without the new solution. Indirect benefits quantified included the increased productivity of staff and were calculated based on the average annual fully loaded cost of an employee, using a correction factor to account for the inefficient transfer of time between time saved and additional time worked.

Not quantified were the impacts on accountability and citizen service driven by introducing greater automation and visibility.