

Cloud Modernization How-To-Guide

# A GOVERNMENT LEADERS BOOK OF **BEST PRACTICES**



We find that a number of best practices tend to surface from Trailblazer's collective experience with the cloud - best practices we frequently capture in a format that makes the perfect "to-do" list for departments and agencies looking to modernize services, transform the mission, and meet the demands of today's digital era.

And we've collected them all in this eBook.

*These best practices were pulled from our **collection of case studies** on the role technology plays in the modern mission.*

*Learn from the kind of inspiring people an organization means when it says "mission-driven." People who are delivering new, imaginative, targeted, relevant projects – everything the word innovation embodies – across the government landscape.*

*Learn from industry Trailblazers.*



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# 01 | **DIGITIZE CUSTOMER EXPERIENCE**

Best Practices for contact center, case management,  
and customer service



# ATLANTIC DIVING SUPPLY

## Connecting the Organization Using a Data-Driven, Digital Platform

Atlantic Diving Supply (ADS, Inc.) is a local dive shop turned top 50 Federal Government Contractor, serving all branches of the U.S. Military, federal, state and local government organizations, law enforcement agencies, and first responders. Starting with a CRM that empowered its technology, processes, and people, ADS focused their efforts on the customer at the heart of the mission.

### 01 | CUSTOMER-CENTRIC IS THE FIRST PRIORITY.

Maintaining a customer-centric perspective ensures that every plan, investment, and action is aligned to the mission – especially critical when the mission promises to provide heavily relied upon services to a regulated, differentiated group.

### 02 | OPEN UP YOUR PLATFORM.

Opening up the right level of access with the right people empowers the kind of quality service that keeps the mission relevant allowing ADS to help their customers anytime, anywhere with any question.

### 03 | FIND AN EASY-TO-USE PLATFORM.

By deploying an easy-to-use platform, ADS unlocks the subject matter expertise from the workforce's experience in a way that makes it actionable in a modern world.

## 04 | TRAIN, TRAIN, TRAIN.

Being able to consolidate functions and focus on training everyone in one system, leads to more use, more reliable data, and better outcomes. This minimizes the headache and frustration that tends to come with the typical change management effort.

## 05 | KEEP AN APPLICATION-BASED STRATEGY IN MIND.

Designing applications with a specific function for a very particular user base helps provide better system performance and a better user experience. The key is developing a strategy of how those individual apps connect with one another, and choosing the right platform to easily facilitate the pushing and pulling of enterprise data between them.

*“For years now, our mission as a team is to be one that is data-driven. Salesforce has really helped us make decisions based on data.”*

**Chris Philbrick**

*Vice President of Marketing at ADS*

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# COLORADO HEALTH CARE POLICY AND FINANCING

## Finding Time to Value with the Cloud

Colorado Department of Health Care Policy and Financing (CO HCPF) launched a new Customer Contact Center that enables agents to deliver better service faster and opens up new service channels. This strategy supports the Department's vision of a single platform that connects Medicaid clients and applicants, service providers, community partners, local government, larger health and human services programs, and more.

### 01 | **SEPARATE THE SYMPTOM FROM THE PROBLEM.**

Identifying a problem can be tricky because it is often buried under a variety of symptoms created when teams work to adjust to or accommodate for a given gap. CO HCPF took the time to recognize these symptoms with a focus on the outcomes and work from there to identify the problem.

### 02 | **DEFINE KEY CRITERIA.**

CO HCPF defined four key initiatives which served as guidelines for what the department needed to prioritize from a technology standpoint. This clarified needs and mitigated distractions that might otherwise put the project's success at risk.

### 03 | FIND AN EXECUTIVE SPONSOR WHO HAS THE TIME TO ENGAGE AND COMMIT.

Christine Comer, Client Services Division Director at Colorado HCPF, served as the Customer Contact Center's executive sponsor, and stayed involved throughout the project lifecycle. Her perspective, context, history, and experience both inspires project owners and related to project stakeholders, keeping the total value proposition intact.

### 04 | LEVERAGE SUBJECT MATTER EXPERTS – BOTH IN-HOUSE AND VIA EXTERNAL PARTNERSHIPS.

Instead of turning staff into technologists overnight, the department was able to keep teams focused on mission-critical activity and connect them to subject matter experts for insights, testing, and validation as needed.

*“Now, agents can complete a process in seven seconds that used to take seven minutes. We can measure every transaction, define how long it takes, and then use the technology to maximize efficiency.”*

**Christine Comer**

*Client Services Division Director at Colorado HCPF*

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# NEVADA DEPARTMENT OF HEALTH AND HUMAN SERVICES

## Building an Inventory Management System

The Nevada Department of Health and Human Services (NV DHHS) promotes health and well-being through the delivery or facilitation of essential services to strengthen families are strengthened, protect public health, and help individuals achieve their highest level of self-sufficiency. In working to protect those vulnerable as a result of opioid use, DHHS deployed the Naloxone Virtual Dispensary, an inventory management application developed on the Salesforce Platform that tracks the funding and distribution of the state's Naloxone supply.

### 01 | UNDERSTAND THE DATA.

By managing Naloxone assets and related processes in a digital environment, NV DHHS is capturing more information about the crisis, which the team can use to better identify patterns, discuss recommendations, and make data-driven decisions.

### 02 | THINK CUSTOMER FIRST.

Ask questions like 'How do we automate routine tasks like ordering and re-ordering? Where and when do they engage with us as a department to get new shipments?'

### 03 | INVOLVE STAKEHOLDERS EARLY AND OFTEN.

Making design and deployment an iterative, collaborative process allows for low-risk testing. It also gives staff a sense of ownership and strengthens the ties between IT's subject matter expertise and line of business' budget priorities, helping both groups make a bigger impact.

### 04 | RECOGNIZE OPPORTUNITIES TO STRENGTHEN THE MISSION.

NV DHHS worked with a phenomenal researcher who has been connecting directly with victims of this crisis. They were able to infuse these learnings into the dispensary, creating an always-on, top-of-mind approach to training.

*"This gave us the latitude to think outside of the box and find innovative solutions, which is especially important in the face of a huge public health crisis where doing more of the same isn't going to work."*

**Dr. Stephanie Woodard, Psy.D.**  
Senior Advisor on Behavioral Health

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# PALM COAST, FLORIDA

## Creating an Integrated 311 and Case Management Platform

The City of Palm Coast, Florida supports a range of communications and services needs on ordinary days but most importantly on extraordinary days, like when the city is preparing the community to withstand a hurricane. The team deployed **Palm Coast Connect**, a cloud-based 311 + case management solution that consolidated 68 different software systems into a single, comprehensive customer engagement platform.

### 01 | CREATE A ONE-STOP SHOP FOR SERVICES.

Palm Coast Connect—the “digital front door” creates a single access point for any and every service on the front end, while still offering the ability to customize the workflow backend. This gives customers and employees alike 24x7, consistent, self-service experience.

### 02 | UNDERSTAND THE POWER OF DATA.

Palm Coast Connect consolidates the data from 68 software systems, giving teams a 360-degree, comprehensive view of an inquiry or case. Providing a better understanding of their resource consumption patterns so that they could adjust their budget plans accordingly and hold themselves accountable for response and/or delivery timelines.

### 03 | RECOGNIZE THE OPPORTUNITY TO BUILD TRUST.

Residents are able to sign-up on Palm Coast Connect, and follow the status of their request without them having to pick up the phone. For Palm Coast, this has provided a transparency and reliability that builds trust in urgent scenarios like their hurricane preparedness and response efforts.

### 04 | ASK “HOW ARE WE DOING?”

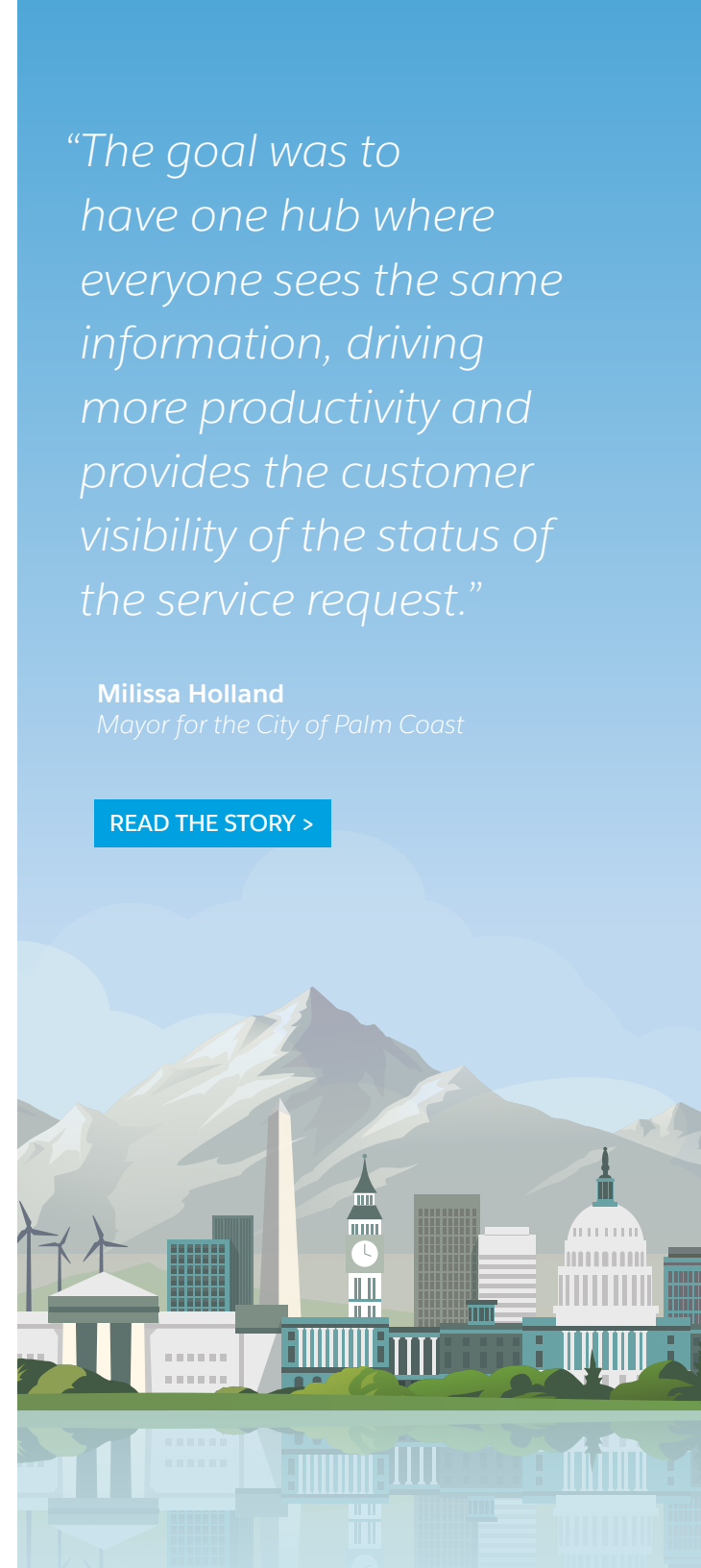
The city conducts an annual survey of its residents in order to see how impactful communications and services are perceived to be. The team uses the results to better understand its relationship with the community, pinpoint areas of improvement, and celebrate the efforts customers see as wins.

*“The goal was to have one hub where everyone sees the same information, driving more productivity and provides the customer visibility of the status of the service request.”*

**Milissa Holland**

*Mayor for the City of Palm Coast*

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# TANDRIDGE DISTRICT COUNCIL

## Deploying a Digital Platform to Support Citizen Relations

Tandridge District Council is a local government organisation located in Surrey, England, that serves 82,000+. It oversees an extremely broad range of services like managing home rental payments, home repair services, housing advice, to environmental concerns, business licensing, parks and open spaces, and more.

Tandridge's approach to a master data management system is a cloud-based CRM and case management solution that integrates the front-end user experience and back-office infrastructure. This gives the team a modern and digital platform to deliver citizen relations and case management.

### 01 | **THINK ABOUT THE GUIDING PRINCIPLES OF YOUR OPERATING MODEL BEFORE STARTING ON DESIGN.**

Tandridge had to navigate some very specific environmental factors impacting the delivery of services. Understanding the drivers and operational impact behind these factors, helped the team design an actionable solution.

### 02 | **START WITH SIMPLE, ORDINARY CASE MANAGEMENT BEFORE IMPLEMENTING MORE COMPLEX CASE TYPES.**

This gives you and your team the chance to rationalise and internalise the design requirements that become the framework for more complex systems. Doing this before moving onto the build phase allowed Tandridge to save cycles later on, and keep cases from falling through the cracks.

### 03 | REVIEW THE DATA QUALITY OF YOUR BACK-OFFICE SYSTEMS BEFORE PULLING THAT INFORMATION INTO YOUR CRM.

Bad data in = bad data out. Deploying a CRM on top of an existing solution served as an excellent forcing function to review historical information, reflect on how requirements have progressed, identify strengths and weaknesses and prioritize a data clean-up effort.

### 04 | ADOPT AN AGILE METHODOLOGY.

An agile methodology allows for the continuous improvement of an application from one design and deployment period to the next. Tandridge leveraged the agile approach and found that gathering, assessing, and standardising requirements prior to each sprint build allowed them to be solely focused on during the go-live phase.

### 05 | RECOGNIZE YOUR AREA OF EXPERTISE - AND LEAN ON PARTNERS FOR THE REST.

Build enough technical knowledge into your team so that you can understand how a given feature, function, or widget will play out in the implementation, but don't ask your teams to become engineering experts overnight. Leveraging partners will help keep your focus on the key objectives, instead of the clerical work surrounding them.

Tandridge Best Practices Continued...

*“Our new master data management system ensures that everyone – citizens, employees, executives, and stakeholders – are taking action and making decisions based on the data.”*

**Elaine Jackson**

*Interim Director of Transformation for  
Tandridge District Council*

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## O2 | MODERNIZE EMPLOYEE ENGAGEMENT

Best Practices for CRM and relationship management



# FEDERAL HOME LOAN BANK ATLANTA

## Empowering Employees to Empower the Community

FHLBank Atlanta built a relationship management platform on Salesforce Sales Cloud, Service Cloud, and Marketing Cloud. It stores all information about a given member in a profile-like setting, addressing the Bank's data management needs while also fostering collaboration among customer-facing employees and opening up mobile access.

### 01 | IDENTIFY A PROJECT SPONSOR FROM THE FRONT LINE OF THE MISSION.

Whether your mission incorporates a sales function, or a services department, outreach team, or intake specialists, finding a way to include people who spend their day-to-day on the front line of the mission will bring a pragmatic element to the foundation of the work.

### 02 | ENGAGE PEOPLE EARLY AND OFTEN.

Engaging as many people as reasonably possible—especially the power users—builds in commitment and adoption, up front. It also highlights more of what the organization needs, giving project owners better context and visibility to day-to-day impacts on the mission.

### WHAT IS ALL THIS CHATTER ABOUT CHATTER?

Chatter is a newsfeed style conversation board that is integrated into records in the FHLBank Atlanta's CRM. It gives users a place to provide noteworthy updates, ask questions, attach relevant files, and more. Individual people or working groups can be tagged by name, triggering push-notifications to various subject matter experts. Users can layer on comments, questions, or congratulations with the right teams, at the right time, about the right topic.

[LEARN MORE](#)

### 03 | ALIGN LOB AND IT EXPERTISE.

The team was able to use a partnership-style approach to get ample input from end users, IT and security throughout the discovery phase in order to build a productive and efficient solution. Doing this pre-deployment saved a lot of cycles.

### 04 | REMEMBER THAT MVP MEANS PRIORITIZE, NOT APOLOGIZE.

It can be easy to forget that minimum viable product (MVP) does not mean malfunctioning, defective, or “we were on a deadline.” Instead, it speaks to the priorities that were included in the project’s original scope and the resulting insights that are considered most valuable.

### 05 | HAVE A PLAN FOR TESTING, SPECIFICALLY.

The team built a Chatter group between sales, IT, and the implementation partner. This gave everyone a view of the issue, as well as what had or what needed to change. It also reduced redundancies—IT wasn’t getting the same request ten times over from ten different people.

*“When people can see that [a given project] is important to sales, they know it will have a direct impact on the shareholder. And in an organization where everyone’s goal is to serve the shareholder, the member, the customer, having a sales-led sponsorship aligns passion to practice.”*

**Scott Brennan**

*Director of Sales at the FHLBank Atlanta*

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# MINNESOTA HOUSING

## Unlocking Data Across the Organization

Minnesota Housing deployed a loan origination and servicing system using Sales Cloud, Community Cloud, and Sandbox. It is a case management-style system that gives Minnesota Housing a platform for processing funding requests, answering questions, closing loans, and distributing financing resources to support the development of new affordable housing units or rehabilitation of existing units.

### 01 | BREAK DOWN THE VALUE CHAIN.

Minnesota Housing did not start this work by looking at a set of features or functionality. They first mapped out their own process or “value chain,” focusing on the people and the experience behind each step in the loan process. This made them determine how factors like program requirements, communications, and user experience played into the mission.

### 02 | REALIZE THAT EVERYTHING NEEDS TO HAVE VALUE.

Recognizing the value that comes from more qualitative achievements can improve everything from operational excellence to office morale. In Minnesota Housing’s case, the system opened up mobility, allowing staff to work remotely, log status updates while out of the office, take advantage of more flexible scheduling and more – just one of the many beneficial outcomes resulting from this work.

### 03 | RECOGNIZE THE VALUE OF PEOPLE.

Investment in technology does not mean divestment in people. Instead, it is an opportunity to reimagine the way your organization functions, and refocus time and energy on the work that's at the heart of the mission – not the clerical work surrounding the mission.

### 04 | BUILD A PARTNERSHIP BETWEEN IT AND BUSINESS.

Rather than approach this as an IT project or a line of business project, the team blended their goals, objectives, and execution plans. This ensured that technology investments were actionable and relevant with respect to the front line of the mission.

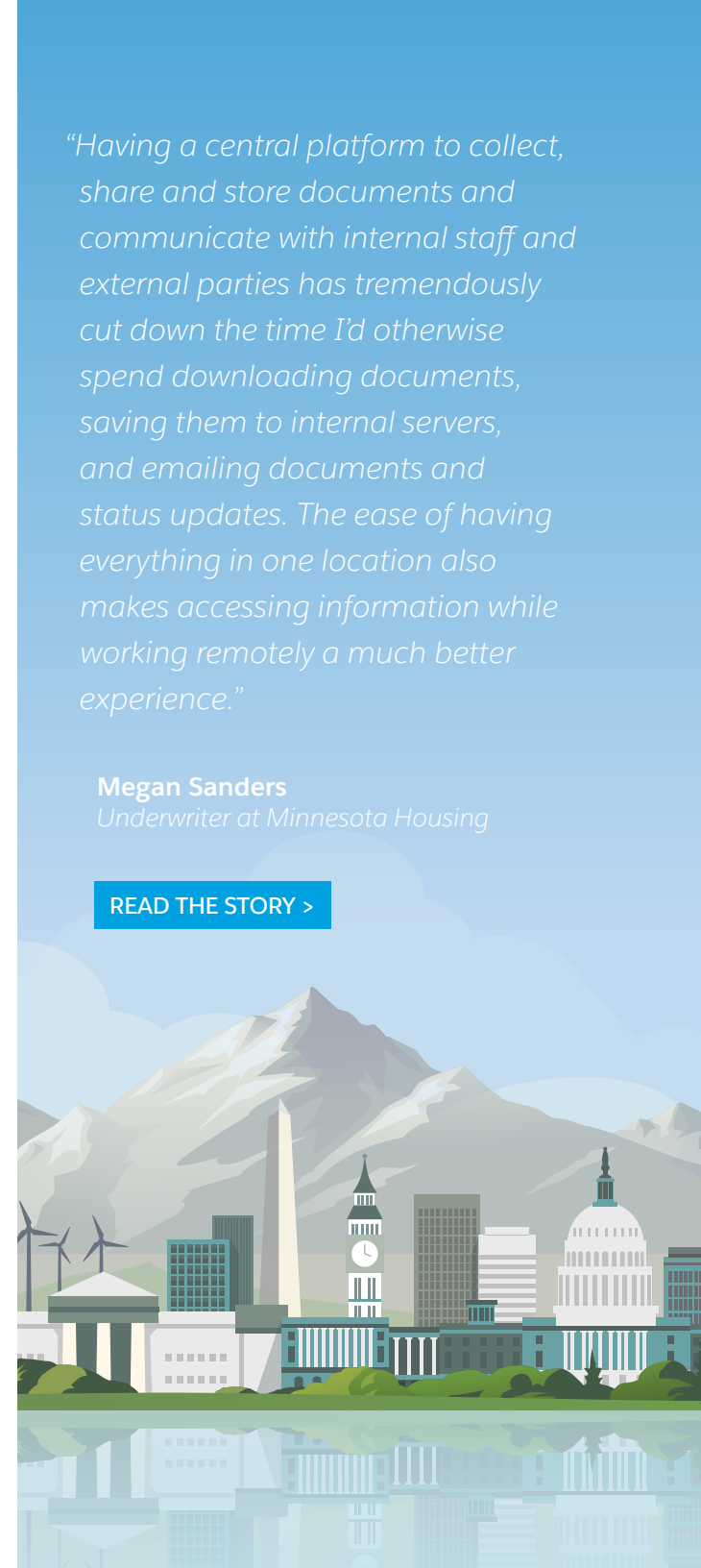
### 05 | ENGAGE USERS IN THE PROCESS.

Engaging users in the process of designing and rolling out technology is critical for effective change management. Minnesota Housing's user engagement model included: Frequent communication through multiple channels, rapid development with demonstrations of proposed features, identifying champions and giving them early access to the product, open office hours to solicit and establish a feedback loop and a phased rollout to allow users to adjust to change.

*"Having a central platform to collect, share and store documents and communicate with internal staff and external parties has tremendously cut down the time I'd otherwise spend downloading documents, saving them to internal servers, and emailing documents and status updates. The ease of having everything in one location also makes accessing information while working remotely a much better experience."*

**Megan Sanders**  
Underwriter at Minnesota Housing

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# 03 | SALESFORCE FOR GOVERNMENT SERVICE

Best Practices for outreach and engagement



# BAY AREA RAPID TRANSIT

## Becoming a Responsive Government Organization

The Bay Area Rapid Transit (BART) is a rapid transit, public transportation system serving the San Francisco Bay Area. BART built a user-generated engagement platform using Salesforce Service Cloud and Salesforce Marketing Cloud's Social Studio. It enables traditional outreach and engagement capabilities, such as social monitoring or post scheduling. Moreover, it was then deployed using a set of criteria that fosters a true customer-centric communications strategy.

### 01 | TREAT SOCIAL MEDIA LIKE A CHAT ROOM, NOT A BULLHORN.

Do not respond with a generic answer, do not point people to a web page, and do not ask them to comb through a long document. Instead, put the detailed information in the first response, demonstrating the organization's empathy.

### 02 | ENGAGE PEOPLE WHERE THEY ARE.

Even though public transit is a very physical service, there are few physical places to really engage in a conversation. Whether it's social media, email, or other methods, taking the time to understand how your customers can engage will help you prioritize relevant communication channels.

### 03 | BE AS TRANSPARENT AS POSSIBLE.

Don't have all conversations in direct messages, offline, or post canned responses. It's flat, it's boring, and it makes it look like you're hiding something. You just have to give your teams the tools so that they're not so scared to do it.

People are so scared to be honest, so scared to be transparent, so scared to share data that they've never shared before. But it's extremely rewarding when you do it because the public will trust you more.

### 04 | DO NOT BE AFRAID TO ENGAGE USERS (EVEN COMBATIVE ONES) IN A DISCUSSION.

BART encourages employees to address the tough questions directly, provided that they have the knowledge base before they engage. To assist and enable staff with this ask, BART deployed its cloud platform as the cornerstone of its larger strategy, unifying communications, media, and social efforts.

*"People don't have time to stop and talk to us in a station because they're on their way somewhere. When people are riding our trains they're usually plugged into their headphones. But by using technology to engage with people over social, I can have that one-on-one conversation."*

**Alicia Trost**

*Communications Director at BART*

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# THE METROPOLITAN WASHINGTON AIRPORT AUTHORITY

## Delivering a Responsive, Data-Driven Experience

The Metropolitan Washington Airports Authority (MWAA) is responsible for the Washington Dulles International Airport, the Ronald Reagan Washington National Airport, a major toll road, and a portion of the DMV metro. The team deployed an outreach and engagement platform on Salesforce that combines social media listening, customer service, and advanced analytics capabilities into one system. This solution gave MWAA the tools it needs to track a question, concern, or incident from inception to closure.

### O1 | **PLAN FOR CHANGE MANAGEMENT.**

By taking a collaborative approach, users have the opportunity to shape the solution and address any situational risks upfront. It also creates a sense of ownership, encourages commitment, and fosters pride in seeing the solution become a success.

### O2 | **FRAME IT UP.**

Organizations that are able to capture data now and build the kind of data volume AI needs in order to reach statistical significance will leapfrog the competition. Whether its car travel, air travel, or another type of mission, departments and agencies need to be prepared to adapt to changes in the customer base, and adopt new technology, in order to keep pace and stay relevant.

### 03 | ESTABLISH A CLEAR VISION, AS WELL AS CLEAR FOLLOW UPS.

Having well-defined goals makes it easy for teams to translate those into measurable, time bound objectives. The result: actionable direction instead of aspirational guidance.

### 04 | LEVERAGE SUBJECT MATTER EXPERTS.

By relying on the technical subject matter expertise brought in by their partner, and applying that to their extensive knowledge of the mission's most critical needs, the team established a successful strategy as well as a successful execution plan. The subject matter experts analyzed business requirements, translated those requirements into IT solutions, created tailored deployment plans, and led SCRUM meetings, training sessions, and more.

### 05 | BASE DECISIONS ON DATA-CENTRIC EVIDENCE.

The platform MWAA built allows the team to move quickly because it unlocks data visibility, giving teams the insights they need to be decisive. Data-driven decisions give a level of reliability and helped move quickly throughout the process, from ideation to deployment.

*“Regardless if it’s good or bad, organizational change is always a challenge. We partnered with other departments to better understand everyone’s needs, and ensure that everyone’s criteria was addressed in the new system.”*

**Saurabh Sharma**

Program Manager for the Business  
Innovation Group at MWAA

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# SALESFORCE PUBLIC SECTOR MARKETING TEAM

## Supporting Government and Citizens Across Digital Channels

Salesforce's Public Sector Business Unit serves as the technology company's government contractor. We are the global leader in Customer Relationship Management ([CRM](#)), enabling companies of every size and industry to create a 360-degree view of their customers using cloud, mobile, social, AI, and more. Our public sector business unit translates these best practices into government capabilities.

In order to turn a message that is designed to be 1:many and make it 1:1, in alignment to the nuances that define government contracting landscape, the Public Sector Business Unit's Field Marketing team stood up a digital center of excellence on [Salesforce Marketing Cloud](#), [Sales Cloud](#), and [Einstein Analytics](#). It brings together email and social media management tools, creating a one-stop shop for all outreach, communication, and engagement activities happening over digital channels with the company's public sector customers / prospective customers.

### 01 | THINK ABOUT THE GOAL FOR EACH CHANNEL.

Starting with your goals, objectives, and resulting activity ensures that your communications are not only relevant, but also a value-add. This approach creates a holistic conversation and takes the prospective customer on a journey with your organization. The result: more traction, better engagement, greater success.

### 02 | KEEP IT SIMPLE.

Content needs to be succinct. Some of the team's most simple emails have performed the best. Some of the team's most straightforward Tweets have seen the highest traction. Run several A/B tests when it comes to email copy, changing subject lines, pre-headers, titles and body copy.

### 03 | FIND THE RIGHT INDIVIDUAL FOR THE ROLE.

Ensure that you understand the outcome of the technology you need to use to meet business goals. And map the skillsets back to those outcomes and goals. You do not always have to find someone who is an expert in technology to be successful in the role.

### 04 | PROVE THE VALUE OF MARKETING.

Using a platform that is designed to incorporate metrics – sentiment analysis, shares, click-through rates, open rate, trends in followers, and so on – empowers employees to show the impact of outreach and engagement activity, not overstate the return nor understate the influence.

*“We want to start conversations over social in order to get the kind of traction that’s needed to cut through the noise on the average news feed. In email, however, any conversation is going to be offline by definition. So we may not want to necessarily start conversations there, especially once you consider the fact that many policies put limits on how frequently you can respond from an enterprise email server.”*

**Anne Dingerson**

*Director of Field Marketing for the  
Salesforce Public Sector Business Unit*



# 04 | INNOVATE ON GOVERNMENT IT

Best Practices in Application Development



# CARY, NORTH CAROLINA

## Deploying a Connected City Strategy

Cary, North Carolina began looking at what early technology adopters were using in their interactions with across other industries. As a result of this research, the team launched several cloud-based application pilots across the community, giving its residents new ways to connect to government services.

### 01 | **KNOCK DOWN WALLS.**

The town of Cary had over 100 disparate systems that created an unsustainable support model. They needed flexibility and agility if they were going to move to the future. This required them to break down the 'walls' between those systems and deploy a single system that facilitated interdepartmental communications.

### 02 | **ELEVATE EMPLOYEE SKILL SETS.**

Teaching people about the flexibility of the cloud and letting them learn to ramp up or ramp down as demand required naturally elevated their skill sets. It made them more viable in Cary, as well as other markets.

### 03 | **ENCOURAGE CREATIVITY.**

Cary's people-centric approach to employee enablement made change management that much easier. They developed several employee groups to foster this approach. The Guild, a regular, hands-on workshop meeting where people come with an idea and leave with an app and The Garage, a think-tank design team that embodies the rebellious nature of startups in an effort to generate new and different ideas.

## O4 | ESTABLISH BUY-IN AT THE TOP.

Cary found that when you have buy-in from the top, it makes things much easier. In addition, their approach for introducing and rolling out the platform, gave them the room to highlight capabilities and benefits. This allowed the team to maximize internal marketing efforts rather than explain the methodology.

## O5 | HIRE FOR MOTIVATION.

How the team builds an app is just as important as what the team builds into the app, ensuring that each new tool has a targeted purpose and therefore a meaningful outcome. Investing in individual passions and natural skills sets is an investment in the mission.

*“We really think about from the moment you wake until the moment you go to sleep, where are all the possible touch points you have with the Town, and how can we make that experience better? How do we meet our citizens where they already are?”*

**Nicole Raimundo**  
CIO for the Town of Cary

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# CITY OF CHICAGO

## Unlocking the Back-Office to Create a Connected Experience

The City of Chicago's 311 City Services Call Center manages non-emergency services and inquiries that keep Chicago clean, accessible, and thriving. The team **re-platformed Chicago's 311 system** on Salesforce's FedRAMP-authorized cloud platform. The new solution transformed the typical call center into a modern contact center, unlocking everything from back-office information to self-service capabilities across a single, connected experience.

### O1 | CREATE A STEERING COMMITTEE.

Creating a steering committee brought two critical elements into the very foundation of Chicago's work: (1) priorities are set by the teams that would also be carrying out the work itself, ensuring that plans are actionable – not just aspirational, and (2) perspective from the top → down and bottom → up helps the team rationalize ideas.

### O2 | ENCOURAGE PARTICIPATION FROM END-USERS.

Once priorities were set and ideas were defined, the Chicago team extended the conversation to its end users. Anyone closer to the customer than you is also your customer. Giving end-users the opportunity to raise their asks tends to create a sense of ownership, boost adoption, and drive success.

### 03 | IDENTIFY EXTERNAL CHAMPIONS.

Bringing in customers early and often gives them the same sense of ownership, builds advocacy, and reinforces the importance of civic duty. In the case of Chicago, one of these champions began sharing the new app with other community members, driving even more awareness through word of mouth.

### 04 | GET SCRAPPY.

Extending the workload through a partnership model helped Chicago maximize its resources. The less obvious benefit: government exists to serve all people, which means it needs to be representative of all people. By bringing diversity into the process, the team incorporated a tone and voice that reflects more of Chicago's DNA.

### 05 | RECOGNIZE THAT AN INVESTMENT IN TECHNOLOGY IS AN INVESTMENT IN THE MISSION.

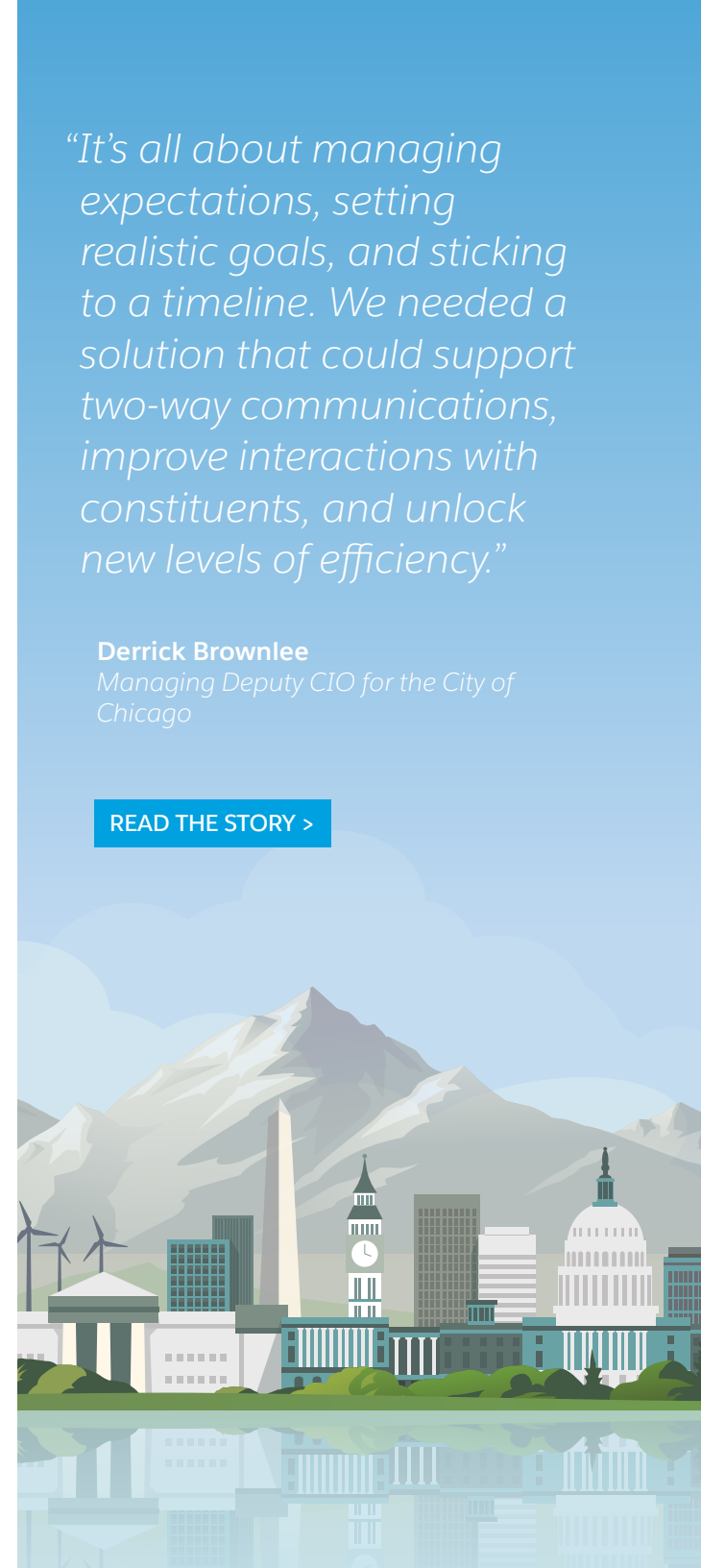
Instead of getting caught up in the costs, focus on the long-term benefits. “We made the changes that were needed in order to enable employees, encourage participation, and keep Chicago a healthy and vibrant community.”

*“It’s all about managing expectations, setting realistic goals, and sticking to a timeline. We needed a solution that could support two-way communications, improve interactions with constituents, and unlock new levels of efficiency.”*

**Derrick Brownlee**

*Managing Deputy CIO for the City of Chicago*

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# WYOMING OFFICE OF STATE LANDS AND INVESTMENTS

## Developing a Digital Platform to Support Digital Transformation

The Wyoming Office of State Lands and Investments (WY OSLI) turned to the agile, iterative nature of cloud technology to build its **Surface Land Asset Management System (SLAMS)**, an integrated application library that not only digitized paper-based, point solutions, but also combined them into a comprehensive, core platform strategy.

### 01 | INVOLVE BUSINESS PARTNERS EARLY AND OFTEN.

WY OSLI took a business-forward approach to their cloud-app platform. This not only ensured the project was developed in a targeted, purposeful manner, but also encouraged involvement from the platform's users. The result: more employees felt a stronger sense of ownership, leading to faster adoption and greater return on investment.

### 02 | CONDUCT A BIG BLUE SKY EXERCISE.

WY OSLI spent a month mapping out every aspect of every service as they might relate to a digital cloud platform. This helped the team identify priorities in context of the larger mission, giving them the insight they needed to plan for both quick wins and the kind of refinements that lock in success long-term.

### 03 | TAKE AN ITERATIVE APPROACH.

The WY OSLI team “saw that the return on investment to doing this iterative approach, to learning something after we learned something, was huge,” said Jason Crowder, Assistant Director for WY OSLI. Having strong proof points for pilot work can solve this.

### 04 | LEVERAGE SUBJECT MATTER EXPERTS — BOTH IN-HOUSE AND VIA EXTERNAL PARTNERSHIPS.

By relying on the technical subject matter expertise brought in by their external partnerships, and applying that to their extensive knowledge of the mission’s most critical needs, the team established a successful strategy as well as a successful execution plan.

### 05 | SET UP A CENTER OF EXCELLENCE.

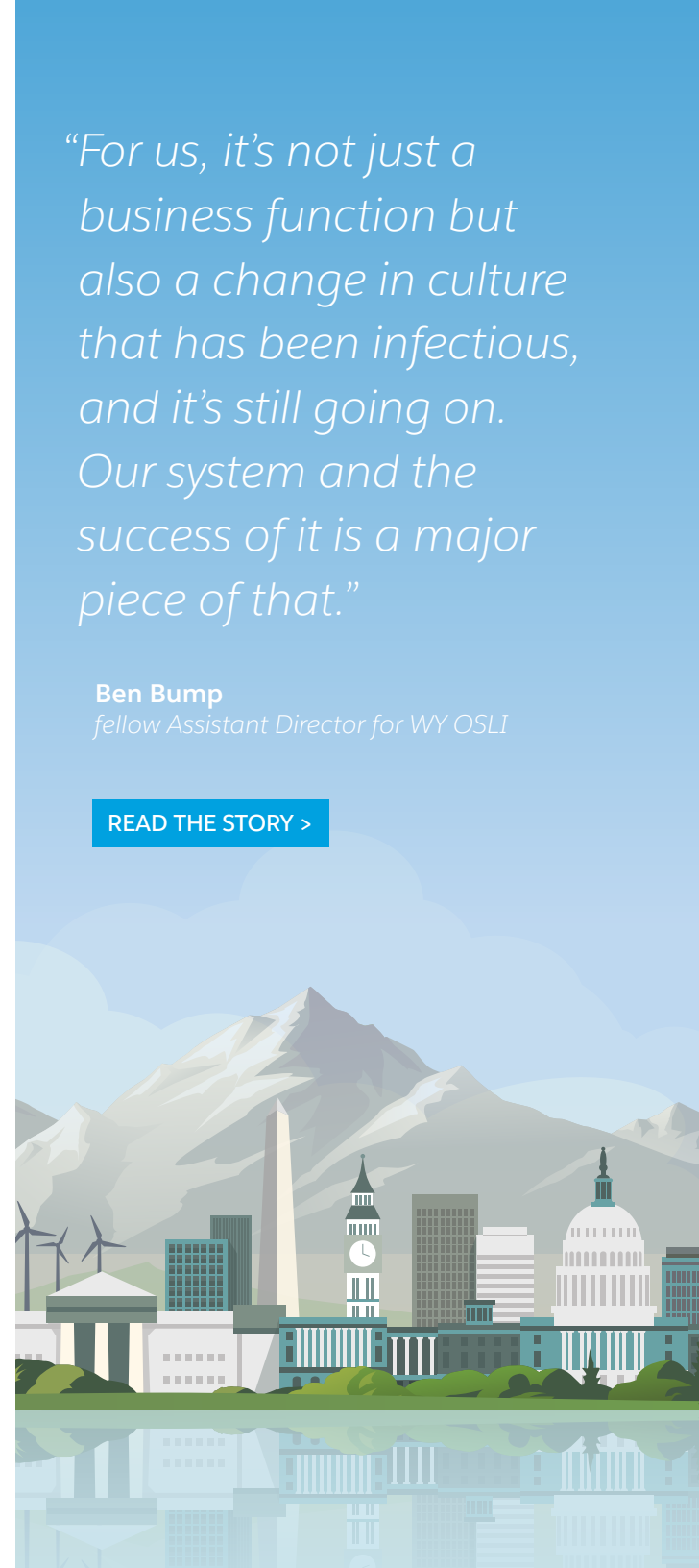
Encourage extended teams to design new applications using on-the-job experience as inspiration. This helps scale IT resources, maintain an integrated model, and develop quality applications faster.

*“For us, it’s not just a business function but also a change in culture that has been infectious, and it’s still going on. Our system and the success of it is a major piece of that.”*

**Ben Bump**

*fellow Assistant Director for WY OSLI*

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The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud shape.

# salesforce

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