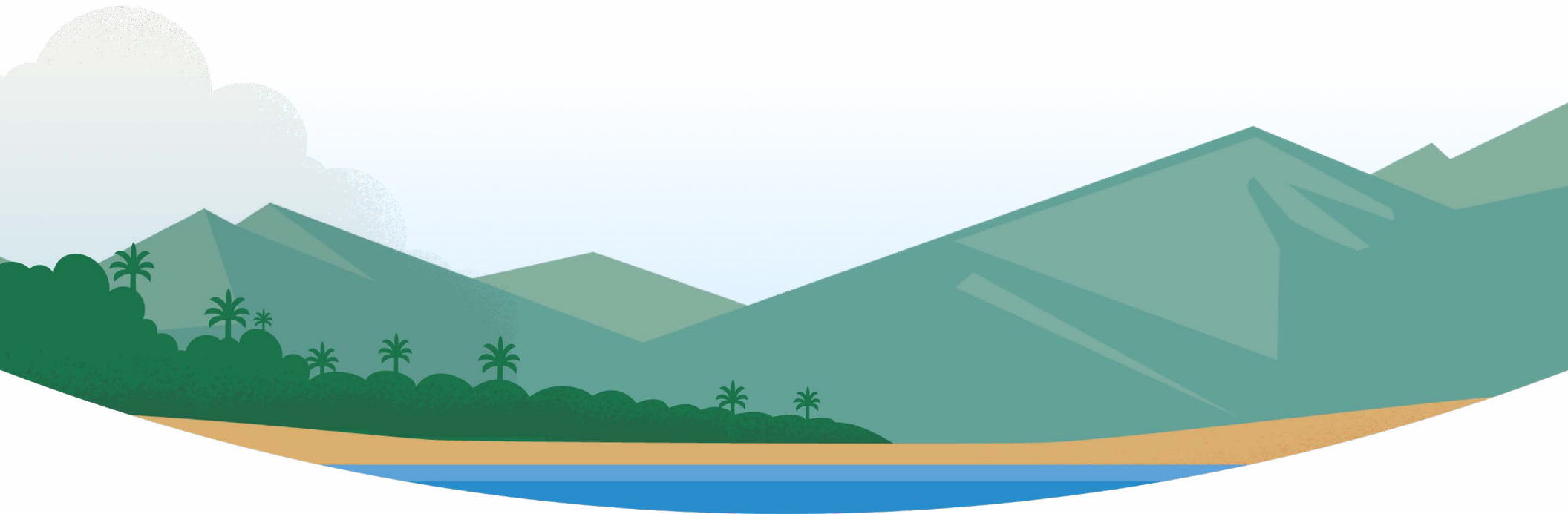# A Government Leader's Book of Best Practices
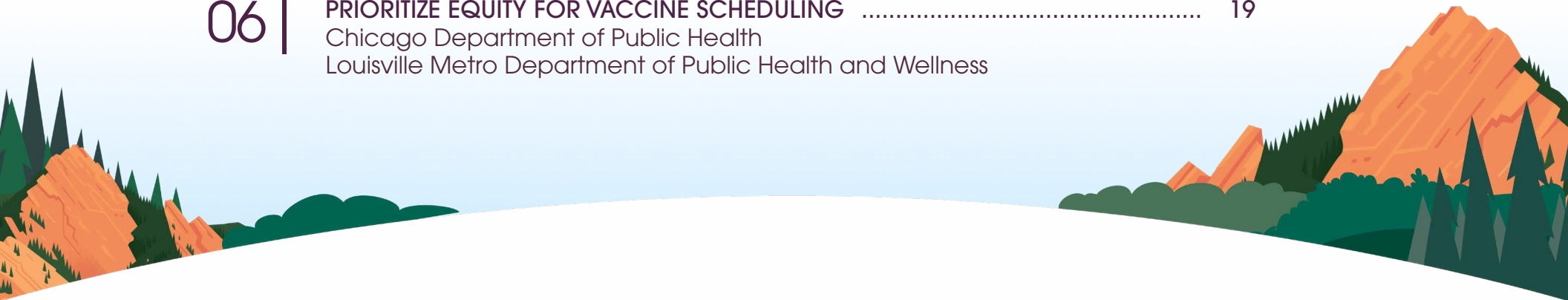
Pandemic Edition

Introduction

Government agencies across the world upended traditional processes and systems in record time as they raced to support surging demand in response to the pandemic. Almost overnight, processes that largely relied on in-person interactions pivoted to virtual environments, propelling government agencies to adopt new technology platforms to meet their constituents' needs.

Here, we share a collection of best practices from Trailblazers who looked to the cloud to help quickly and securely modernize services that enabled them to support and lift up their communities during this crisis.

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01 | ORGANIZE EMERGENCY RESPONSE PROCESSES AND RESOURCES

CDR MAGUIRE

CDR Maguire is a government contractor that manages over $2 billion in construction and over $10 billion in disaster recovery, making it one of the country's leading enterprise resource planning experts – largely in fast-paced emergency response scenarios. When the company was contracted with multiple labs as well as departments and agencies across the State of Florida to build testing and processing services, at a time when much was still unknown and supplies were scarce, it launched an emergency enterprise resource planning (ERP) system on the Salesforce Customer 360 Platform for Government. It gives CDR Maguire a single platform for managing, automating, and coordinating the various business processes that come into play when responding to a crisis like COVID-19.

01 | MORE IS NOT ALWAYS BETTER.

Agile technology helps streamline processes that are otherwise left to manual or paper-based solutions. It can capture data, automate workflows, reduce the potential for error, and more. CDR Maguire took advantage of these capabilities by moving to the cloud, freeing up time and energy for its people to focus on mission-critical work. .

02 | BREAK IT DOWN INTO TASKS AT HAND.

Instead of trying to overhaul an entire emergency response effort, CDR Maguire tackled it step-by-step. First, the team launched a portal that streamlined the intake and distribution of information in real-time. The team then added a call center, followed by platform-level enhancements, and then layered on vaccine distribution workflows. This helped the team be actionable at each step of the COVID-19 response.

03 | MAKE REFINEMENTS AS YOU GO.

Create an iterative process that captures feedback from customers who have interacted with the ERP and integrate that feedback into the design accordingly. This is especially important when dealing with a quickly changing scenario. Making time and space for a positive feedback loop helps make the system agile, useful, relevant, and smarter, enabling the people and processes to course correct and work more efficiently.

04 | COMMUNICATION IS KEY.

CDR Maguire prioritized how the communications process would work throughout the entirety of its emergency ERP platform, communicating with the public to demonstrate that they were listening and working on solutions.

05 | AVAILABILITY OF DATA ALLOWS FOR BETTER DECISION MAKING.

Utilizing cloud based technology with resource reporting and data analytics tools allows stakeholders to make better decisions in response to a disaster, allowing communities to recover faster. CDR Maguire was able to provide clients with real-time data and performance metrics, assisting in decision making on site performance, site location, and ensuring underserved community needs were being met.
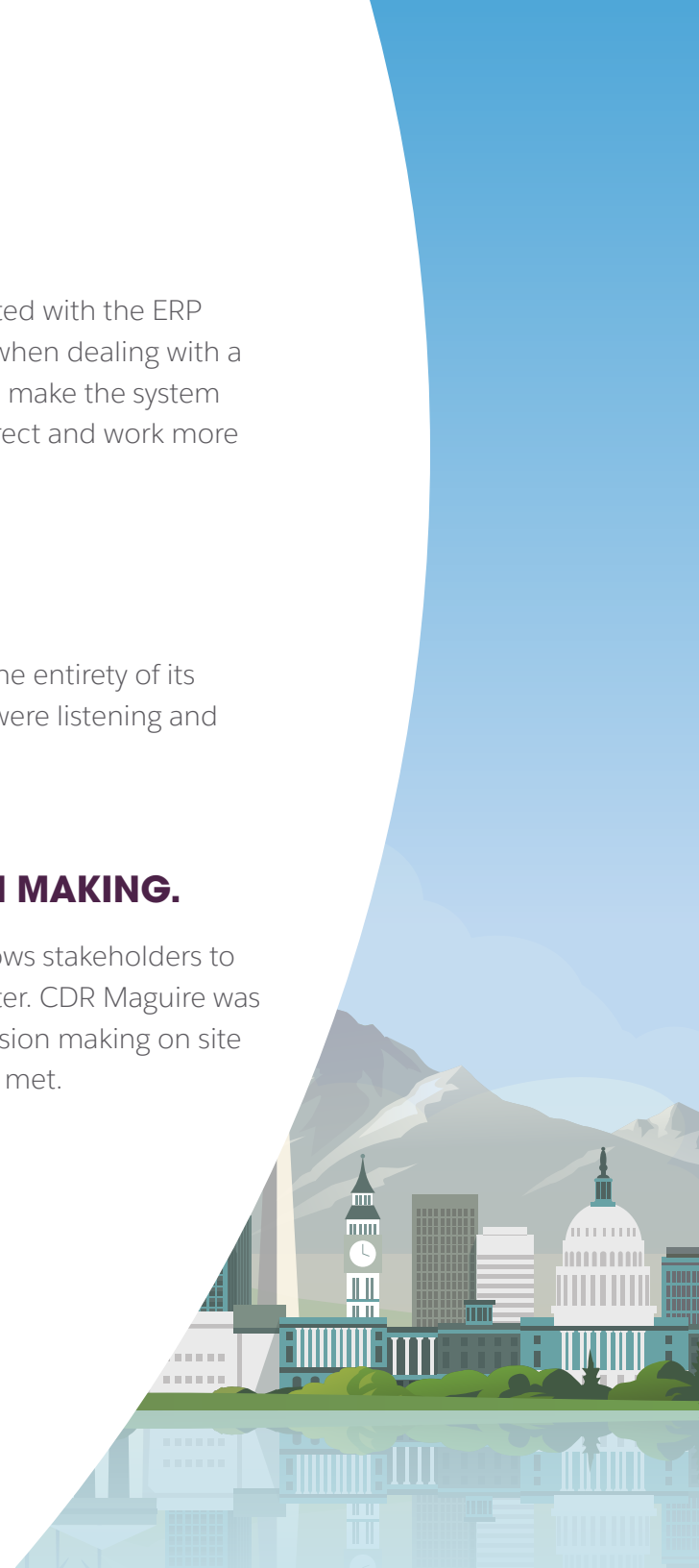
02 | QUICKLY SOURCE AND DISTRIBUTE CRITICAL SUPPLIES

CALIFORNIA GOVERNOR'S OFFICE OF EMERGENCY SERVICES

The **California Governor's Office of Emergency Services'** (CalOES) is responsible for managing public safety communications, keeping a stockpile of necessary supplies on hand, developing a response plan for any disaster, and managing the funding that brings those plans to life when California's 38 million residents need them most.

With the onset of COVID-19, the CalOES team found itself having to source an unprecedented (and largely unknown) quantity of PPE. The team deployed a comprehensive PPE management system on the **FedRAMP-authorized** Salesforce Customer 360 Platform for Government. It gives the state a single, automated, consistent place to go for ordering, filling, distributing, and measuring California's PPE needs – allowing them to source and distribute supplies on a whole new scale.

01 | EMBRACE AN ITERATIVE PROCESS.

An iterative process makes it easier to adjust plans based on how a tool, platform, system, or process is received by its users. The result: taxpayer dollars tend to be used more efficiently. It also helps teams move quickly in times of need.

02 | CREATE A MINIMUM VIABLE PRODUCT.

An iterative process and minimum viable product (MVP) go hand-in-hand. Instead of waiting to launch a tool or system until it has all the features and functionality one could possibly imagine, an MVP helps teams focus on what is mission-critical, which is especially important in a crisis management scenario.
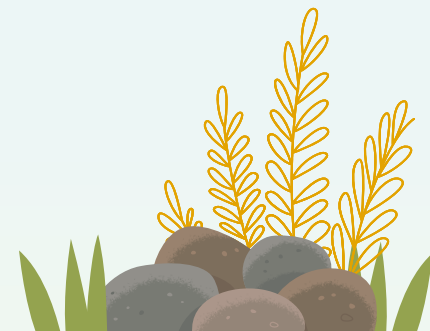
03 | INVEST IN A MODERN PLATFORM.

Making sure that you have an incredibly intuitive and easy-to-use platform that people can leverage without much thought is critical. The longer or harder it is for them to get up to speed and do their jobs, the longer it will take for them to act, which is counterproductive (if not detrimental) in an emergency. Web-style interfaces, clickable buttons, and guided workflows are typically more intuitive to today's user – and inherent to a modern platform.

04 | ADAPT BEST PRACTICES FROM THE PRIVATE SECTOR.

The OES leadership team was looking for a maintained platform that other people are using so that they could leverage the best practices, learnings, and development cycles of the private sector. SaaS-based platforms allow for updates to be pushed to its users automatically, meaning the community of customers can all benefit from one person's innovative idea or discovery. They are also managed by a technology subject matter expert, meaning time and energy spent on designing new architectures, gathering compliance documentation that shows the platform's ability to meet standards like NIST, and more is freed up to focus on mission-critical work.

05 | TAKE THE TIME TO STOP AND SMELL THE NUMBERS.

Results and metrics are often a reflective exercise. But in the same way an iterative process gives teams the opportunity to make real-time adjustments, integrating reporting throughout the process or operations gives leaders the ability to make more strategic decisions, update the public with clearer progress reports, and base future funding or resource estimations on real data points.
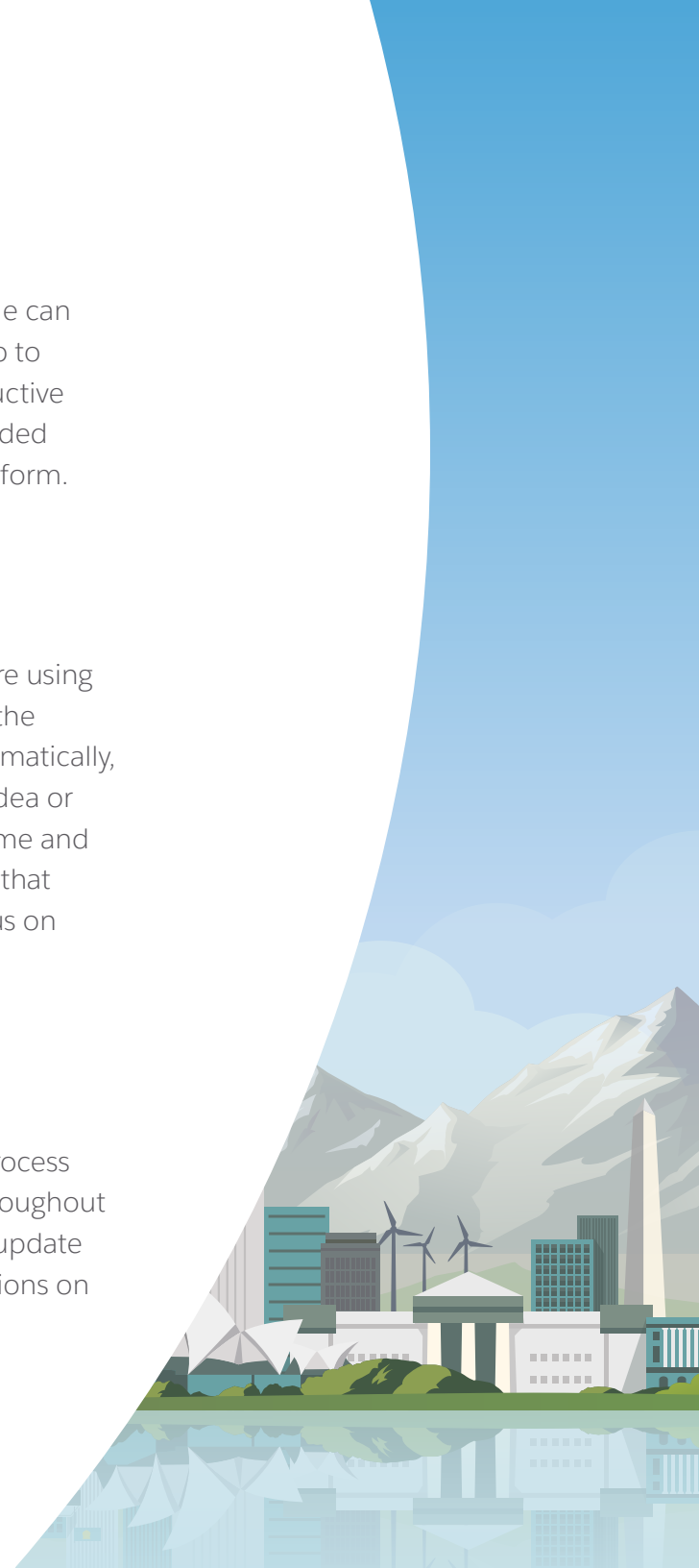
03 | SAFEGUARD THE COMMUNITY AND ITS MOST VULNERABLE RESIDENTS

RUTLAND COUNTY, UNITED KINGDOM

Rutland County is committed to achieving a vibrant quality of life for its residents, a mission that is guided by a four-part corporate plan: deliver sustainable development, maintain vibrant communities, provide customer-focused services, and protect the vulnerable. "And it is these last two pillars, of course, that have become especially top of mind with the onset of COVID-19," said Andy Nix, Head of Information and Communications Technology and Customer Service at Rutland County. In order to deliver more services, faster, with the kind of personalization more vulnerable residents need, Nix and team launched a hotline on a dynamic call center platform, in just three weeks, that allows especially vulnerable customers to call in for help with needs like food delivery service. The team then followed it up with a self-service grants management system that accelerated the disbursement of financial support to businesses.

01 | RUTLAND LOOKED TO CONFIGURE INSTEAD OF CUSTOMIZE.

COVID-19 didn't give the county the time to build the kind of customization an on-premise solution would require in order to meet the unprecedented needs of this crisis. Instead, they are using core Salesforce functionality to deliver 90% of what they need out-of-the-box, and then only pursued additional development to satisfy the more niche customer needs. A configurable platform cascades changes automatically, reducing the time it takes to update a system. This gives teams a responsive platform that is able to act on new or changing information – such as moving a customer's food delivery request forward with contactless service even if the "no fever" box was checked, since COVID-19 cases present a wide variety of symptoms – or no symptoms at all.

02 | KEEP IT SIMPLE.

Rather than overdeveloping a solution, the team at Rutland County spent a lot of time working out what the solution needed to do versus everything it could do and iterated from there. The team focused on customer-first services and user-centric design principles, helping frontline employees make a bigger impact, faster.

03 | REASSIGN STAFF AS NEEDED.

When Rutland had to close its libraries due to COVID-19 health protocols, the team retrained those employees to serve as call center agents so that they could work the hotline. This helped them scale up staffing quickly when they saw call volume increasing and maximize their resource efficiency. By reassigning employees to new initiatives (even if just temporarily), the team focused more time and energy on Rutland's mission-critical work – especially important when dealing with crises of speed.

04 | EMBRACE THE REMOTE WORKFORCE MODEL.

Setting up their customer service center on cloud telephony allowed them to send non-essential staff home with nothing more than their laptops and headsets because they have the same access as if they were in the office. The team even deployed both the hotline platform and the grants management system while working from home, demonstrating the true power of the IT organization.
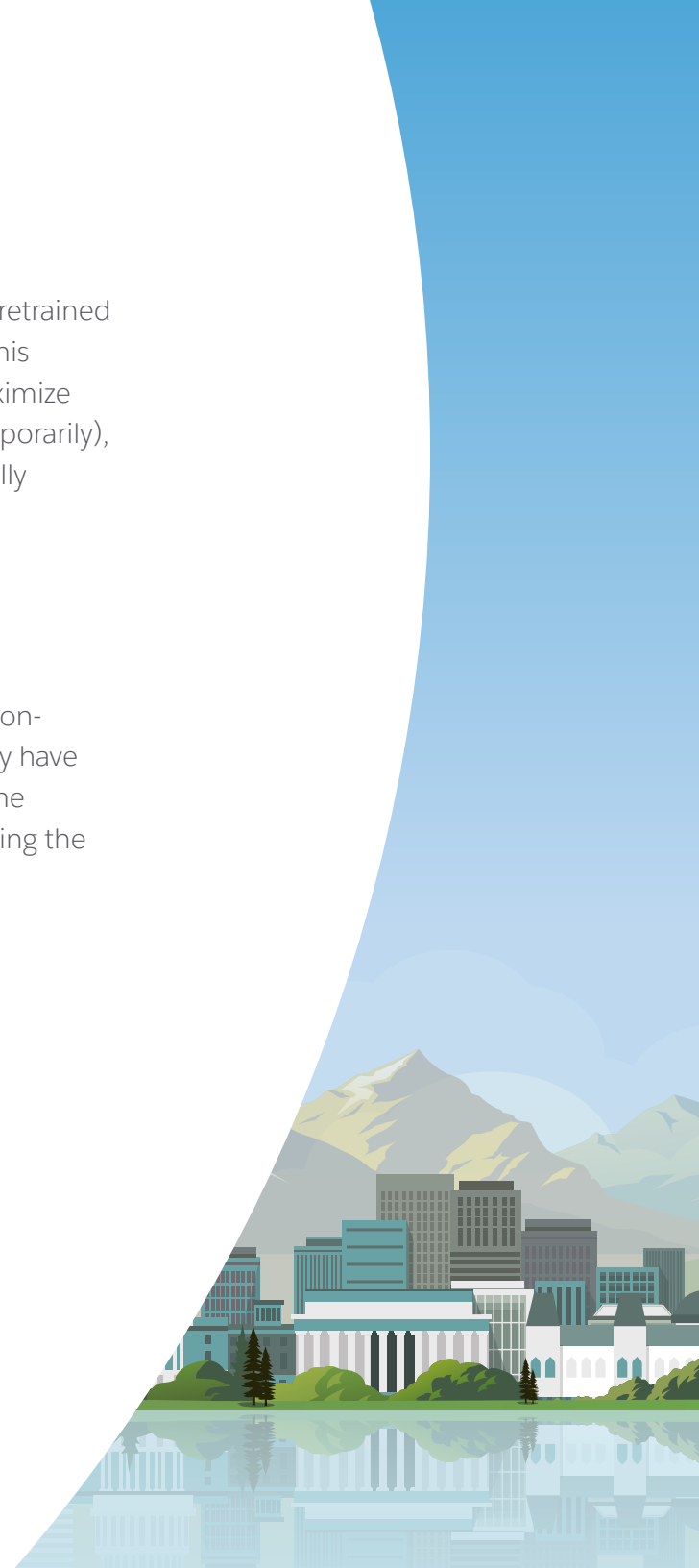
04 | DISTRIBUTE NEW FUNDS TO HELP COMMUNITIES THRIVE

UTAH GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY

The Utah Governor's Office of Economic Opportunity (GO Utah) manages programs, funding, and services designed to make it easier for Utah's entrepreneurs to open a business as well as attract new business opportunities to the state. This helps increase employment opportunities and strengthen the local economy. As COVID-19 began to threaten businesses and scare consumers, the GO Utah team looked for a way to give business owners the financial help they needed today with a reporting plan and a communications strategy capable of answering questions that public taxpayers and the larger community would be asking tomorrow. The team launched a loans and grants management platform on the Salesforce 360 Platform for Government. GO Utah can track, manage, and deliver grants programs with ease with increased visibility across the entire funding lifecycle within a single platform. They were able to assist small businesses when COVID-19 struck by deploying a new grant program in one business day.

01 | RECOGNIZE CUSTOMERS AS CUSTOMERS.

CRM tends to be the last piece [of technology] governments migrate toward because it doesn't typically think it has customers. For GO Utah, their customers are the business owners who rely on the agency's services, the people those businesses employ, and people who patronize those businesses. GO Utah's CRM-style platform gives the team a customer-first foundation, infusing that mindset into every resulting strategy and operation. It demonstrates that GO Utah's investment in technology is an investment in the mission, and therefore in the people that mission serves.

## 02 | PLAN FOR A REMOTE WORK ENVIRONMENT.

A cloud platform enabled GO Utah to transition to a remote work environment. Non-essential employees need to be ready to move back to a remote environment at a moment's notice – which means their leadership needs to be ready to enable a remote workforce just as quickly. (Plus, several organizations are discussing whether or not to make remote working models the standard after seeing the cost and productivity benefits that have come from this shift.)

03 | PUT YOUR DATA TO WORK.

GO Utah isn't just processing grant and loan applications on its platform – it is tracking and reporting as well, unlocking all kinds of data-driven insights that can help the team improve future services. The insights allow them to make program justifications and inform local policy on where and how to put money into Utah's economy, helping the right businesses receive the right kind of support.

04 | EMBRACE A "CAN-DO" ATTITUDE.

GO Utah's strategy allows the team to take a given program, pull the framework or template that was built into the platform to manage it, make adjustments for similar efforts, and launch those features accordingly. The end result: new programs go live faster because the team was able to reuse existing tools and leapfrog the development process instead of building each new workflow from scratch.
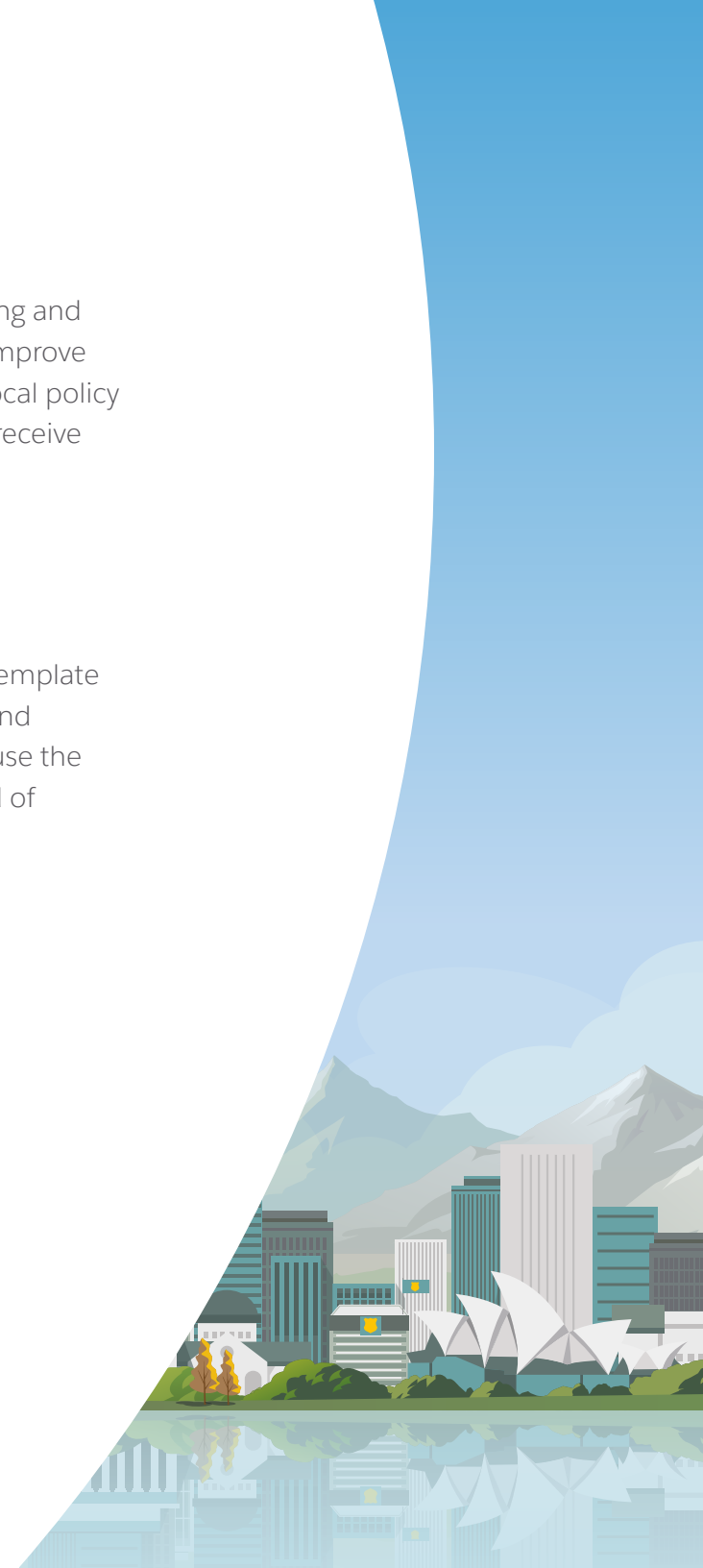
05 | DEPLOY A COMPREHENSIVE CONTACT-TRACING EFFORT

STATE OF RHODE ISLAND

The State of Rhode Island transitioned its contact tracing system from an on-premise solution to Salesforce's Customer 360 for Government. It gives the Rhode Island Department of Health a comprehensive record of each and every COVID-19 case across the state, and allows for a more integrated and adaptable solution to the pandemic. The state illustrates many contact tracing best practices and is also an example of the kind of a public-private sector partnership McKinsey says differentiates this crisis's contact tracing efforts from those in the past.

01 | PRIORITIZE SPEED.

Cloud-based delivery platforms are inherently much faster and more efficient than the paper-based processes of yesteryear. The latter can lead to lag time in reporting, and raise the potential for data-entry errors. At the same time, standing up a new on-premise system can take weeks, if not months – a timeline that doesn't align itself to a crisis where hours and days could literally mean the difference between life and death.

02 | PRIORITIZE FLEXIBILITY.

When COVID-19 was first detected in the U.S., in late February 2020, known symptoms were cough, fever, and shortness of breath. Since then, the Centers for Disease Control and Prevention (CDC) has expanded this list to include loss of taste and/or smell, headache, nausea, and more. As we become more knowledgeable about the virus, testing, and tracing systems need to be regularly updated to reflect the latest information.

Cloud-backed testing and contact tracing systems are inherently flexible allowing administrators to update their fields and forms with real-time data at frequent regularity. When tracers ask the right questions, everyone is working with the most updated data.

03 | CONFIGURE, DON'T CUSTOMIZE.

Because COVID-19 is a moving target, custom-built contact tracing systems, especially on-premise or legacy systems, may create problems as the entry fields needed will likely change over time due to advances in knowledge of the virus, resulting shifts in protocol, and more. For example, if an administrator wants to track a new symptom due to recent learnings from the medical community, they would need to manually copy and paste that new field across any custom-built areas of the platform.

On the other hand, if an admin with a configured platform makes an update, that change will automatically cascade throughout the system, reducing the time and energy spent on maintenance.

04 | START WITH WHAT'S CRITICAL.

Minimum viable products (MVPs) allow teams to get to market faster because they are only focused on building out critical components, instead of all the "nice-to-haves" that might be included with "ordinary" projects during ordinary times. MVPs also give organizations the ability to learn from and adjust to what's working, instead of wasting time developing features that never get used or may not have the intended impact. This has proven to be an especially important strategy in contact tracing deployments because it helps departments roll out critical capabilities fast – Rhode Island, for example, launched its system in just four weeks – and layer on additional features like self-service test scheduling, email communications, SMS messaging, and more from there.

05 | ENSURE EXECUTIVE BUY-IN.

In a municipal, statewide or enterprise setting, any foundational project requires full buy-in and continuous support of the senior most leaders at an organization because such an endeavor almost always requires the coordination and collaboration of several, independent teams all at once. And cross-functional projects are more successful when they are championed by a unified leadership team.

06 | PRIORITIZE EQUITY FOR VACCINE SCHEDULING

CHICAGO DEPARTMENT OF PUBLIC HEALTH

The **Chicago Department of Public Health** (CDPH) delivers programs and services which help build a healthier Chicago, starting with those least likely to have access to privately funded healthcare plans. These include healthy housing programs, emergency preparedness, adolescent health programs, and more.

In order to help protect the city's most vulnerable residents from COVID-19, the team turned community data into a scalable, bi-directional, human-centered vaccine scheduling system built on **Salesforce Government Cloud** and piloted it during the 2020 / 2021 flu season.

01 | START WITH DATA.

As a part of the Healthy Chicago 2025 program, the city did a lot of up-front work to collect data from the census, hospital systems, community indices, housing programs, and more. That gave them a foundation to build upon when looking at the impact of COVID-19 across the city and spotlighted the most vulnerable communities first. This gave CDPH performance indicators that produce clear learnings, which can then be used to address gaps or roadblocks on future endeavors proactively.

02 | MAKE IT A SELF-SERVICE SYSTEM.

Self registration is the best path, especially in scenarios where data accuracy is paramount or on-site staff is expected to be extraordinarily busy. When it comes to personal information, self-registration not only improves data quality but also focuses more of the staff's time and energy on mission-critical work instead of the clerical work that might come with it.

03 | TEST THE SYSTEM THOROUGHLY.

In order to ensure the city had an intuitive, reliable system that could build public trust, organizers embarked on a week of testing where they solicited feedback from staff as they registered for their own flu vaccine appointments.

04 | INVOLVE IT EARLY.

With a challenge as nuanced as vaccine distribution, the city had to lean heavily on different subject matter experts across the city. Bringing IT into the conversation from the beginning helped organizers make ideas as actionable as they were visionary. It also helps maximize technology investments, ensuring more taxpayer dollars are spent on the programs and services that have a meaningful impact across your community.

05 | LEARN FROM PREVIOUS CLOUD DEPLOYMENTS.

Organizers looked to Chicago's contact tracing system for design and deployment inspiration, fast-tracking several steps in the development process. That helped them stick to their timelines and focus on delivery. Look for the common business challenge a project solves: contact tracing is a unique spin on complex case management. Vaccine management is a robust example of scheduling and/or inventory management. Identifying the commonalities will help you leverage more templates, ideas, and inspirations.
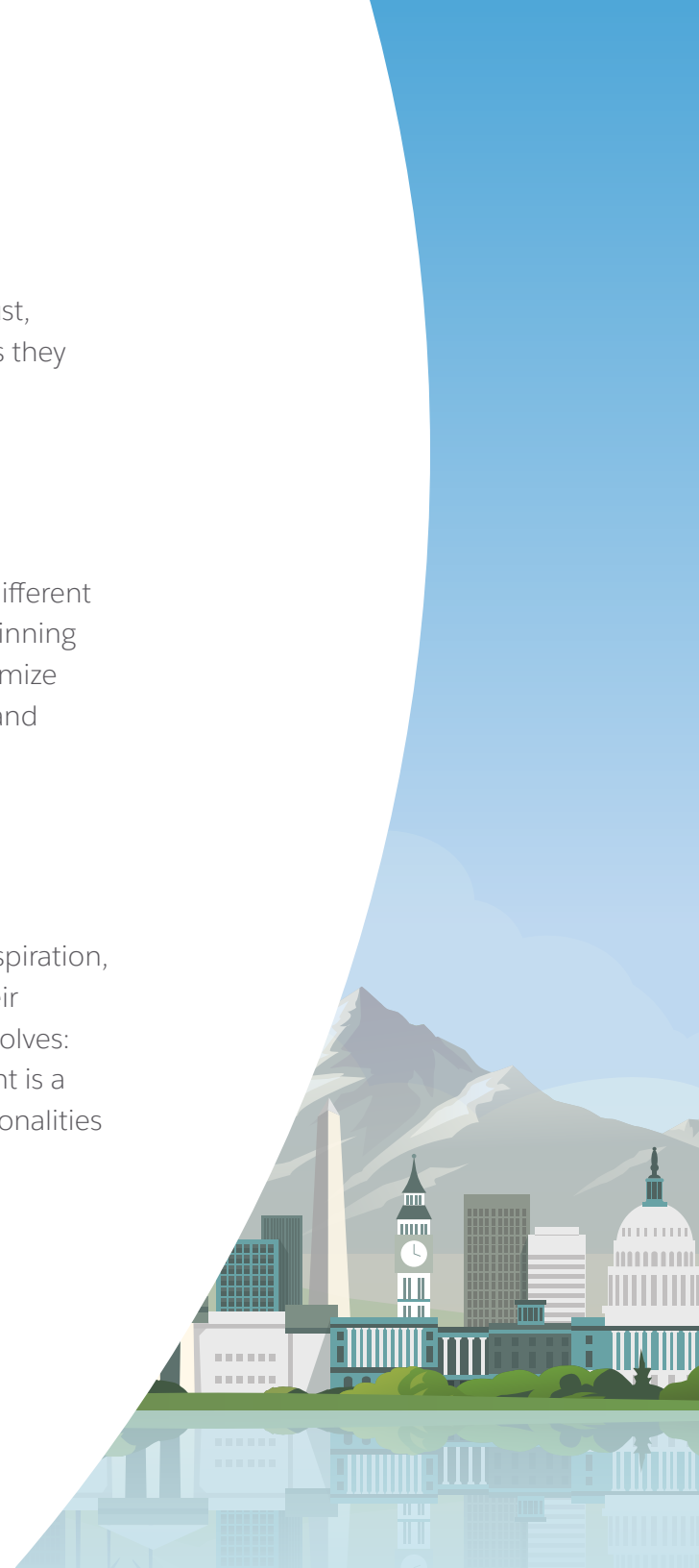
LOUISVILLE METRO DEPARTMENT OF PUBLIC HEALTH AND WELLNESS

The Louisville Metro Department of Public Health and Wellness (LMPHW) works to achieve healthy equity and improve the health and wellbeing of all Louisville residents and visitors. When the COVID-19 pandemic hit, the team led a number of different response initiatives, including setting up LouVax – a comprehensive vaccine scheduling and management system built on the FedRAMP-authorized Salesforce Government Cloud.

01 | LEAD FROM THE FRONT.

When transforming entire systems or processes, being decisive about mission-critical features and functionality gives teams the tools they need to respond to the most urgent matters and not delay action for secondary priorities.

02 | EMPOWER YOUR TEAM.

Louisville sought out and assembled a team of talented, passionate people and supplied them with not only the proper resources but also the freedom to innovate. The autonomy and flexibility enabled the team to develop an efficient, trustworthy solution, and they've done it," said Dr. Hartlage.

03 | EMBRACE DIGITAL, SELF-SERVICE PLATFORMS.

LouVax is more than an online registration system – it's the kind of modern, digital platform customers have come to expect of any service and an example of why such strategies are imperative for government services. The ability to keep people in their cars, for example, is really important because it helps maintain social distancing measures and limit the exposure potential for staff.

04 | HAVE AN INTENTIONAL COMMUNICATIONS STRATEGY.

Decisions regarding vaccine distribution are really difficult to make, but organizers knew that they needed to be transparent about the decisions they were making and why they arrived at those decisions so that people might at least understand and know what to expect.

05 | INVOLVE THE COMMUNITY.

Complex challenges can rarely be solved alone, so Louisville turned to public-private partnerships with private hospitals and other providers, pharmacies, and other community groups that helped their team divide and conquer. For example, LMPHW created a Metro Vaccine Distribution Task Force composed of clinical experts, community leaders from faith-based and secular organizations, local employers, and more. The task force meets weekly to discuss trends in questions or concerns from the community, look at COVID-related data by zip code and neighborhood, and reach out to those who may be disproportionately affected by the virus, creating a familiar, relatable, trusted connection.
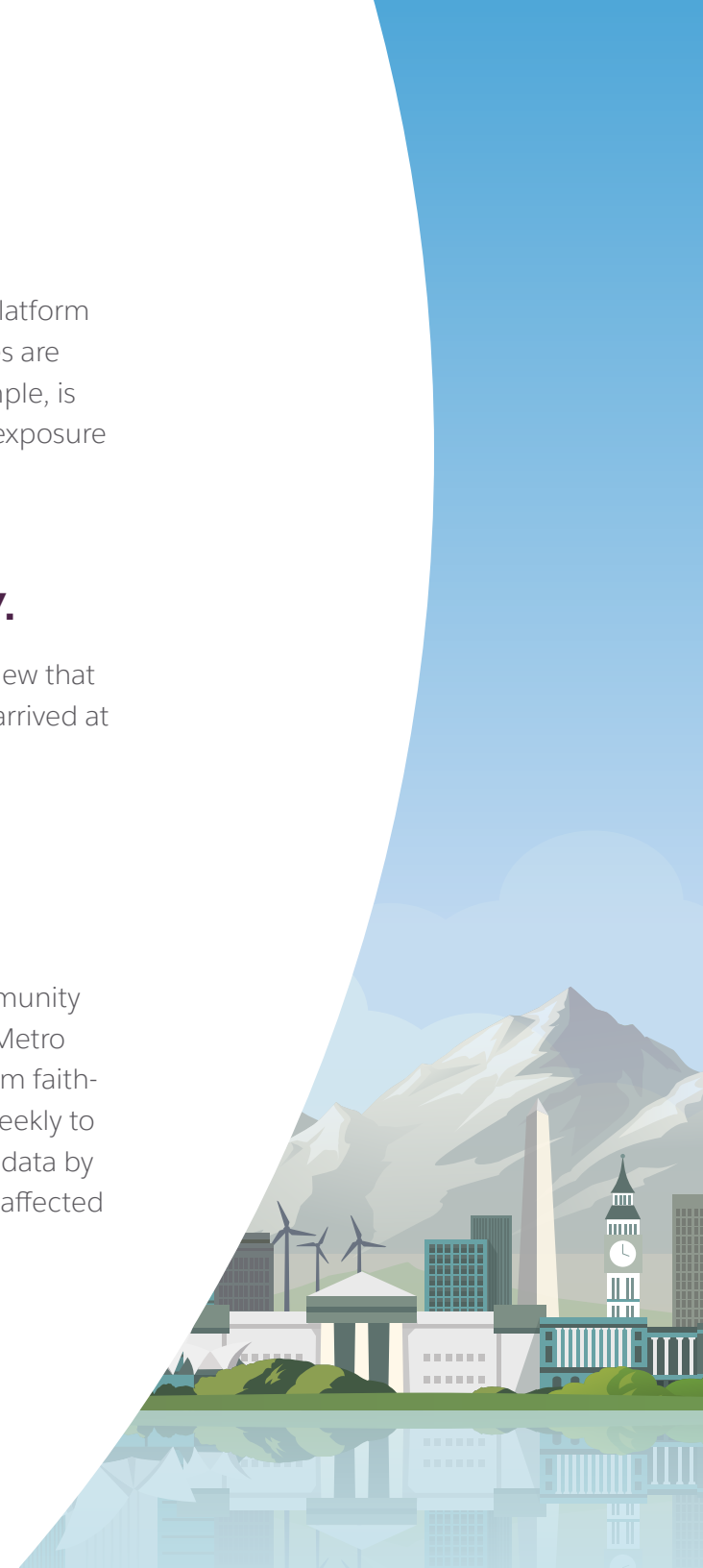
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