Smart Gov TTL Project

Background, Proposal and Plan

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Executive Summary

Scope

CSC identified that the length of an average SmartGov client time-to-launch (TTL) was 32 weeks and that this was an impediment to accelerating sales growth. A review was performed to identify the root causes of this and to develop a plan to reduce this.

Findings

The review identified 3 primary causes of the extended TTL

1) Brightly Software strategy of positioning SmartGov as the most customizable solution in the market has led to service driven sales (usually on the order of 2.5 to 3x the ARR) to take advantage of this configurability
2) This positioning also led to an institutional resistance to standardization of the product and a resistance to creating a best practices low-configurability version of the database that would significantly shift the sales from services driven revenue to software driven revenue
3) Product training knowledge was kept at the tribal level and only lightly documented. A relatively high turnover in both management and consultants has led to a loss of standardization in product training as well as depth of industry experience.

The review also identified that this highly configurable approach was also creating an extended time-to-quote (TTQ) (on average 2 months).

Recommended Plan

In order to significantly impact the TTL we need to create a more standardized approach to launching SmartGov. This includes the following major initiatives:

1. Creating a best practice driven preconfigured database that sales can offer and can be implemented with minimum customization.
2. Creating a standardized set of reports and output documents
3. Creating different price points and levels of customization to drive prospects to low or no configuration options. This will require significant investments into our pre-configured database setup to be more regional in their approach.

	TTL Weeks	% Improvement
Current	36	
Core	11	**69.4%**
Pro	20	**44.4%**
Enterprise	29	**19.4%**

To reduce the TTQ we will redevelop the pricing configurator and reduce the amount of data required to develop the quote.

- A large part of these time savings will come from offering a standardized data migration option that will not require the client to get a copy of their existing data

Next Steps

We have already started both steps 1 and 2 of the recommended TTL reduction plan and have presented a revised pricing configurator to sales that is currently undergoing stress tests.

With these initiatives we expect to be able to bring TTQ down to 24 hours from 2 months and achieve a TTL time on the order of 16-20 weeks from 32 weeks.

To bring the TTL down further we will need to move forward on step 3 of the plan and create regionalized databases and additional sales price points.

Introduction

As discussed in the executive summary, starting in mid-Q3 of this year CSC has undertaken a project to significantly reduce the time and cost to launch our SmartGov product. This project was initiated with feedback from sales that this time and cost was impacting their ability to sell both down-market and to the mid-market. It was also identified that the service revenue driven model was not scalable to the same level that a product revenue driven model is. This document will lay out the results of the discovery process that was undertaken, our target end state, and the project plan to achieve that target state.

Problem Statement

CSC has become an impediment to sales due to the length of time and cost to the client that it takes to launch SmartGov.

Discovery

In this section the current state along with the outcomes of this state are reviewed.

General SmartGov Observations

Until now, Brightly has positioned SmartGov as "the customizable solution" in the market and this has meant we have not been successful moving from a service revenue driven model to a software revenue driven model. This is because:

- Product designs the product to enhance the customizable features
- Sales sells the benefits of a customizable product
- CSC quotes and implements the product with focus on retaining the clients existing processes by customizing the software to match them

In addition to this, there are severalpractices that cause client confusion and these lead to sales and CSC slowdowns:

1. **We sell access to the full software, but services for specific modules.**
    - The client can access each of the modules, but services are required to install each of the modules
2. **The language used to describe features is internally focused vs client focused**
    - For example, "reports" are documents generated by Exago which is viewed as a "reporting tool". These could be analytical information traditionally considered a report, but also simply product outputs (documents) such as permits or form letters that use fields populated by database values
    - We focus on product features for naming vs client practices. E.g. Where many clients use the term "recurring permit" we call this a "license" in addition to actual licenses (as this is the feature we use to implement recurring permits)
3. **Lack of a system level output document area**
    - Output Documents ("reports") are currently grouped by module (permitting, licensing, etc) but we do not have system level report area
    - This means that reports that can be used by more than one module, or may not specifically apply to a module at all are typically found in "permitting" creating user confusion

4. **Lack of connectors forces custom work**
    - Having a non-exposed API and no merchant gateway means that any integration and all merchant connectors are all custom jobs for each merchant/client vs. readily available plug and play components that immediately work
5. **Data migrations are all custom work**
    - With each data migration being a custom job that is quoted individually and based on the customizations that are setup in the software, this results in very complicated and time-consuming migrations that rely on work being completed in the configuration before it can move forward. Further complicating the process is that if a configuration must be altered during the validation process, the data migration bust also be altered resulting in significantly more time forsetup and client testing.

CSC Specific Observations

1. **Team skepticism about the process**
    - Within the implementation team there is general skepticism about the organization's commitment to process improvement and the team feels burnt out from going through this process several times, dating back as far to a Paladin attempt.
    - For example, Paladin trialed a "SmartGov Express" package that was just a preconfigured permitting application about 2 years before Brightly Acquisition but that did not really move forward
    - Starting in May the consultants began looking at configuring and training SmartGov in a more standardized manner. This effort produced minimal gains due to the team still working from a non-standardized database setup and a lack of co-ordination with sales to sell the benefits of standardization
2. **Attrition of expertise**
    - The turnover of experienced consultants resulted in a team with differing levels of expertise in each area of the software with no one proficient enough in all areas to drive adoption of best practices and standards
3. **An overly consultative professional services approach**
    - While clients value our expertise, in an attempt to be client centric, we have been overly accommodating in how we configure SmartGov. This approach results in clients that do not know what the system is capable of being looked to by the implementation consultants for making configuration decisions they are ill equipped to make. In many cases this leads to client indecision
    - There is minimal best practice sharing – the assumption is that the clients know best and we ask the clients to send us their business processes and then try to match those as closely as possible vs have them follow industry best practices (or even just the "Brightly" way).
    - Unfortunately, this leads to long data gathering times as we need them to map out all their existing processes vs just getting their core information of:
        - fees
        - list of permits, licenses and violation types (per the package that they purchase)
        - GL Accounts

        - Parcel Connectors
        - Map
        - Merchant Account information
    - This also leads to longer than necessary validation times as we then require the client to develop their own testing plans based on their own workflows. Many clients have no idea how to do this, and even when shown how is a major undertaking for them

4. **Validation Rework**
    - This lack of understanding of the validation process also leads to lots of rework on the configuration as they have not validated all the processes or once training starts, they realize that they do not like the workflow that they setup.

- **Custom configurations deny use of standardized trainings (VCT's)**
    - Due to the custom configurations the consultant that did the setup is required to train the client
    - This is because with a custom setup you need to know the details of that setup to properly train it.
    - Because of this SG cannot take advantage of VCTs or even implementation specialists that focus on turning around standardized implementations quickly.
- **Lack of standardized output documents ("reports")**
    - Our current lack of a good set of standard "reports" (outputs) means that many reports need to be customized orstarted from scratch.
    - Many of our existing output documents still have paladin logos still hard coded into them
    - These barriers mean we have extended timelines for creating custom reporting based on the custom workflows
- **GIS Mapping and Parcels data collection issues**
    - This should be a straightforward process, but this often gets very complicated and confusing for both the client and Brightly.
    - Clients have the capability to provide this information, but frequently our consultants take this task on themselves
    - Consultants feel they do not have the voice or authority to push the client to do their part of the project

Observations for each stage:

In this section of the document, each major phase of the implementation process is identified and followed by a list of key observations

Our process can be broken down into the following stages (although some of these will often run concurrently):

1. Kick-off Call
2. Collecting Data
3. Data Migration
4. Configuration
5. Validation
6. Report Development

7. Connector Integration
8. Training
9. Post Launch Support

1. **Kick-off Call**
    - Minimal opportunity to reduce time.
    - We have a 10-day SLA for sales and the PM to setup an introduction handoff call which then typically leads quickly into the kick-off call where the client is given access to basecamp and given their data collection homework
    - One aspect that can be improved is currently the PMs have no access to recordings of demos to help resolve what was promised to the client vs what they SAY they were promised.
2. **Collecting Data**
    - This is a large opportunity to reduce time.
    - Data is provided sporadically through the process by the client
    - Currently we have limited documentation for sales to give the client so they can pre-gather their required data
    - As all of our implementations are "enterprise" style right now, a lot of the data gathering is to determine the current workflows that the client follows so we can replicate this in SmartGov rather than provide the client a best practice workflow for them to follow
    - Even small clients can have a significant number of workflows (many small jurisdictions in Florida are over 80)
3. **Data Migration**
    - This has significant opportunity to reduce time
    - Currently we have two options for data migration
        - We will load the data into a basic in-house SmartGov data warehouse with limited ability to search
        - We can do a full custom enterprise level data migration where we match the data to all the custom fields that are created as part of the Configuration process
    - This means that the migration scripting is frequently redone 3-4 times as clients change their configuration through validation and training
4. **Configuration**
    - This is the second longest part of the process
    - No best practice guides on standard configurations for different apps
    - Limited number of "best practice" templates to start from, many times consultants are starting from scratch vs making alterations to already built workflows
    - With no standardized workflows to reference, clients typically try to match their existing workflows. Once these get built, they realize that they want to change those workflows to take advantage of additional SmartGov features creating a lot of rework for the consultant
5. **Validation**
    - This is typically the third longest stage of the process and typically not effective
    - Clients are asked to develop their own validation processes with some training

- Some consultants wait until the end of the configuration to have clients validate the entire setup at once and others do a concurrent validation. This is also sometimes driven by the client.
- No standard validation processes
- When this process does not happen well, the first few days of training turns into an in-person validation and configuration update, extending the training timing and forcing another pass at the data migration scripts

6. **Report Development**
   - Lack of high-quality standard reports and documents means that consultants will go to previous project to grab reports or just create the requested reports from scratch
   - Complicated reporting structure with some reports living in SQL reports and other in Exago
   - Many consultants are searching for copies of existing documents and re-creating them as custom reports for each client
7. **Connector Integration**
   - Aliene in August completed a 3-month process of documenting (internal and client facing documentation) and training the consulting team on the connectors
   - Consultants find it hard to maintain expertise on the connectors as they may only install one or two instances of a connector in any given year
   - The lack of a merchant gateway that can more easily setup merchant accounts or an API means that connecters remain a very manual process
   - Despite these barriers, this does not add significant time to launch except in cases where the client does not have the information or knowledge that the consultant needs
8. **Training**
   - While the team has regular training sessions, standardized processes and documentation for training only started in June.
   - Training will often turn into a Brightly led validation process for the first couple of days as the client has not validated the processes properly, or frequently had IT people validate the processes vs the front-line workers who then push back on the workflows
9. **Post Launch Support**
   - Post Launch Support is a defined period in the contract where the consultant remains the primary client contact to answer any questions as with a custom build support often cannot easily determine how to resolve or train the issue that the client is facing.
   - With a standardized offering this would not be needed or reduced

Target State

With a solid understanding of the current state provided above, this section outlines a target future state. This section covers changes necessary across:

1. General team changes
2. The recommended product packages
3. All implementation process stages

General Team Changes

The primary change that needs to be made to achieve our goal is a reversalof strategy:

- Currently we view ourselves as a highly customizable software that we can add some standardization to
- We need to reframe this (from product, marketing, sales, CSC) as a highly standardized software with a huge capacity for customization

Product Packages

The primary differences between these levels are the degree to which the client can customizes their workflows and has access to settings. Pleases see this link for the full break down:

https://readme.dudesoln.com/display/SMAR/Workflow+Packages

Core:

The core package is almost entirely locked down with no ability to modify workflows or reports. Training is standardized based on the standard configuration. No post launch support is required from the consultant as no customization was done.

Pro:

Most areas of the software is unlocked, and the client will have the ability to customize the workflows themselves. We would train and launch in our core configuration or close to it (minimal customization) and would offer additional training on how to customize workflows and reports. Post launch support is provided, but over time may not be required as our pre-seeded databases get more regionalized

Enterprise:

Full ability to customize the software with help from Brightly PS team. Quote/SOWwould have to be specific as to which workflows and reports Brightly would customize on behalf of the client. This is the same offering as now, but time savings will be found as we have a better base product to work from rather than starting from scratch each time.

Implementation Process Stage Changes

This section details how each of the stages will be improved to achieve the TLL reductions. This has been developed with consideration for the time savings at each package level.

<table>
<tr><th></th><th>Core</th><th>Pro</th><th>Enterprise</th></tr>
<tr><td>1. Kick-off Call</td><td colspan="3">

On this call the client gets introduced to basecamp and the data collection requirements are shared with them. We are currently evaluating a new process whereby the consultant is not assigned until all data is received. This will apply to all three package levels.
Another time-saving process we should develop is to provide clients with basic technical/computer competence videos and basic SmartGov LMS courses that would allow the client to quickly gain an understanding of how the product works.

</td></tr>
<tr><td>2. Collecting Data</td><td>We will be able to significantly reduce the data collection period as the will only</td><td>The data collection time will be reduced but depending on how many workflow</td><td>Data collection will still take time, but instead of starting from scratch in all</td></tr>
</table>

<table>
<tr><td></td><td>need to provide the basic data of:
1. Fees
2. List of permits, licenses and violation types (per the package that they purchase)
3. GL Accounts
4. Parcel Connectors
5. Map
6. Merchant Account information</td><td>customizations the client has purchased these workflows will need to be discussed.</td><td>cases, the consultants will start from a best practice workflow and ask how the client would like to modify it.</td></tr>
<tr><td>3. Data Migration</td><td colspan="3">Three packages are now being offered
o Self-Load: For a flat rate we will provide the client with excel sheets that they can populate with their own data. We will load this data into a sandbox environment for them to review and then do a final load
o Standardized Data Load: For a flat rate we will load their data into pre-configured data loading sheets that use standardized field titles. (Available to all levels)
o Custom Data Migration: We will provide a custom quote after reviewing a copy of their exported data and align it with a custom configuration of SmartGov (Available for Enterprise only)
How these will link to product packages:
o Core: Client who purchase the Core package will only have access to the Self-Load and Standardized Data Load options. There will be no reconfiguration of the migration scripts as the workflows and field are locked at this level
o Pro: Pro subscriptions should have access to both the Data Mart and Standardized Data Load. There will be no reconfiguration of the migration scripts as any custom workflows are built on our standard fields at this level
o Enterprise: With the custom workflows that Enterprise allows you to setup, we will need to offer a Custom Data migration as we do now but ideally offer the standardized data migration to start. There will be limited time saving at this level as we will have the same challenges that we have now with custom workflows changing throughout the implementation process.</td></tr>
<tr><td>4. Configuration</td><td>Configuration should be limited due to the limited number of customizable fields. Only core fields of fees, permit types,</td><td>The client will have a limited number of workflows and templates that they have customized.</td><td>While we will still have the most work to do, but by using best practices we will reduce the total time a consult takes.</td></tr>
</table>

	etc. will still need to be setup		
5. Validation	Validation should be reduced to a week as we are just validating that the data the client provided was loaded correctly. The workflows will be trained as part of the regular training and do not require validation.	Validation will take longer than Core as you may have some custom fields or workflow variations that need to be reviewed. This process should be set by Brightly vs the client trying to determine how to do this	As customization should start from an existing workflow vs from scratch. Brightly should be responsible for setting up the validation setup and showing the client how to follow it. This should reduce the time the client spends trying to figure out how to setup validation processes.
6. Report Development	There is no report development as they will use the standardized reports that link to the standardized settings and workflow. The reports will be trained as part of the training process.	There will be some additional time to train the client on how to customize reports to match the workflows that they will be customizing.	Brightly will continue to setup custom reports that align with the custom workflows that the client has requested. These would have to be clearly defined in the SOW and should take less time than they currently do as they can start with the well setup base reports that come with the system.
7. Connector Integration	There is no difference between the levels on how the connectors get setup. As we open the API and add a merchant gateway that allows faster setup of merchant accounts these setup times should fall, but with no change in technology CSC has limited ability to reduce setup time. One suggestion to designate several consultants as experts on connectors and they do all the connector setups. This means that they will be able to hone their skills with these setups instead of having to remember something they do two or three times a year each time they get a new connector.		
8. Training	Training on core will have the ability to be very standard and potentially even be turned into a VCT or self-led LMS if we reach a volume of	These trainings will not change significantly, however we should focus on "train the trainer" trainings rather than full org trainings as we have run into a few times recently	

	sales that supports those options		
9. Post Launch Support	As Core is fully standardized and locked there is no need to have a consultant led post launch support and the client can get passed directly to LST.	Depending on the level of customization, pro clients may be passed directly to LST with a comprehensive set of notes or may benefit from the standard post launch support period with the consultant.	As this will have a significant amount of customization, a post launch support period is still warranted here to ensure a successful launch. The high service amounts for these deals will mean that our margins remain high.

Predicted Time Savings

CSC tracks all labor hours with time tracking compliance accounting for more than 92% of all time each week. Based on our time tracking data and expert judgement, the following table provides a detailed breakdown of the anticipated time savings for our current offering as well as the proposed Core, Pro, and Enterprise offerings. There are two measurements of improvement. The sub-totalis just to the launch date (TTL), but with Core we will also be able to remove the need for Post Launch Support which will reduce the total effort required.

	Kick-off Call	Collecting Data	Data Migration	Configuration	Validation	Report Development	Connector Integration	Training	**Sub-TOTAL**	**% Improvement**	Post Launch Support	**TOTAL**	**% Improvement**
Current	2	7	4	6	5	3	3	2	32		4	36	
Core	2	2	2	1	1	0	2	1	11	**65.6%**	0	11	**69.4%**
Pro	2	3	2	2	2	1	2	2	16	**50.0%**	4	20	**44.4%**
Enterprise	2	6	4	4	3	2	2	2	25	**21.9%**	4	29	**19.4%**

Pro and Enterprise TTL reduction will be primarily achieved with the initiatives outlined below that will be completed by EOY and sales will be able to start selling based on these timelines once completing training in November. This will substantially remove the timing impediment that CSC has imposed. However, with the sales cycle and the current backlog many of these gains will not be fully realized on the CSC team until Q4 of 2022

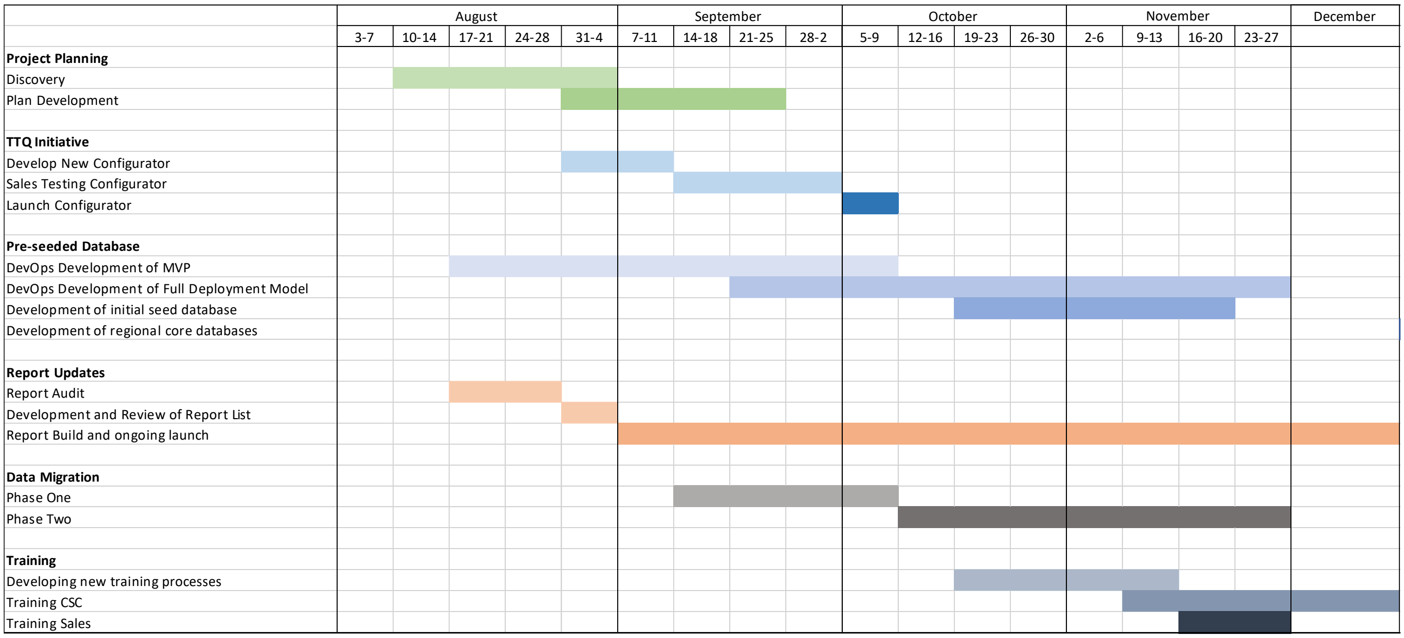
Core sales will initially be limited by the limitations of the initial core database. To fully realize this TTL reduction regionalized Core databases still need to be developed. As these databases come online through 2022, the final sales impediments will be removed for these regions and the full TTL reductions will be able to be realized on the CSC team quickly after these sales.

Project Plan

DACI

Drivers:	David Richardson – Manager of CSC Operational Excellence – David will be responsible for the discovery, project planning and change management Aliene Chase: Sr. Product Expect – Aliene is a product and technical SME who will be developing the seeded databases and new report and output documents. She will also help with the re-training initiatives. Kelli Bolt: Professional Service Manager – Kelli manages the SmartGov consulting team and will be responsible for managing the changes to her team
Approver:	Matt Jackson – SVP CSC – Matt will approve the level and direction of the changes proposed in the plan
Contributors:	Jed DeGroot: Sr. Director of Implementation – Jed oversees all implementation services and will be consulted on how the new processes will impact his goals and resources Consulting Implementation Team – This team will be able to offer insight into the current processes and will also be a primary recipient of the new process training Sales Team – This team will be able to offer insight into the current processes and will also be a primary recipient of the new process training Dev Ops – Dev Ops will be developing the database tools needed to properly deliver the seeded database options
Informed:	Engineering – At this time no work will be required of engineering, however the change in Brightly strategy will need to be adopted by this team Product – While the product team has been a great sounding board for this initiative, at this time no additional work will be required of product, however the change in Brightly strategy will need to be adopted by this team

Project Timeline



Time-to-Quote (TTQ) Initiative

CSC is actively working with the Sales team to redevelop the pricing configurator.

We are making two substantial changes along with other minor ones

1) Providing quick quote options for Data Migration: With the standardized and self-serve data migration tools that CSC is developing, sales will not need to request a copy of the database for review prior to quoting these services reducing the TTQ by 4-6 weeks on average.
2) Simplifying the custom template quote process: We are changing the way we sell custom templates from individually sold application specific templates, to groups of 10 templates that can be used in any application. This will reduce the TTQ by 2-4 weeks as sales will not need to review all of the different templates, but just get a directional idea on the number of templates needed.

In total we are expecting to reduce the TTQ from 2 month to 24 hours or less and this project should be completed by mid to late October

Pre-seeded Database:

Dev Ops is building the tools required to be able to launch and manage pre-seeded databases. Our phased requirements are listed here:

https://readme.dudesoln.com/display/SMAR/DevOps+Seed+Database+Process

MVP Functionality – Ready on Oct 19 for Aliene to start fully testing and rolling out our initial pre-seeded database

- Target is to have an initial version of the pre-seeded database for Aliene to share with the Solution Consultants for demo Between October 15 and 30 (dependencies on demo data creation assistance from Sales and ease of use of the database tools developed by dev ops)

To realize the full amount of time savings the pre-seeded databases will need to have ongoing refinement and regionalization for a longer period – estimated 12 month of ongoing research and configuration work. This will also include report updates and refinements.

The work here will involve research into different regions regulations and requirements and then taking that knowledge and building a series of databases that respond to these unique characteristics

Report Updates

Reporting is a critical piece to improve TTL. There are several parts that will improve reporting:

- Having a locked/seeded database means that reports can be designed for that database and workflows
- For custom database configurations, having well designed preconfigured reports will significantly reduce the time to create many common reports as the consultants would be able to more quickly reconfigure existing reports

Report and Document Audit – Complete

- Aliene pulled and reviewed the ~24k reports that currently have been built and from this developed a list of 152 reports that should come with SmartGov as well as a plan to build this out

Report Header/Footer Clean-up – Complete

- Aliene has gone through the 47 existing reports that are on our list (and we are going to keep) and replaced the Paladin logo with code that will automatically load the client logo thus saving this customization on every client.

Report Clean-up/Build – 350 Hours (9 weeks) estimated

- Target date to be completed is by Dec 31/22

Data Migration

Develop the standardized data migration product

We are doing this in two phases

Phase One:

- A list of fields for each module
- A workbook for each module should the customer decide to load the workbook themselves with some comments as hints

Phase Two:

- A document outlining the definitions of each of the fields (datatype, max length, allowable values etc...)
- A list of the pre-configured implementation data so that they can map the old values to the new values (aka transform)
- Possibly workbook validations that the customer can run to verify that their data meets our minimum requirements

Phase one has been delivered to Sales for review

Phase Two will be scoped once the Phase One comments are tested and returned by sales.

Internal Training Requirements

There will be a significant amount of training required for Account Executives, Solution Consultants, PMs, Implementation Consultants, LST members and CSMs to shift current attitudes and give them the knowledge to take advantage of the new tools and processes

Account Executives: Account Executive will need to be provided with new talking points, success materials (data requirement sheets, data migration materials, etc.) and provided with a matrix on which size clients and targets each product package is best targeted to.

Solution Consultants: Solution Consultants will need to be trained on the features of the new database, as well as have ongoing training as the database is upgraded and new version become available .

PMs: PMs will have to develop implementation plans and Basecamp templates for each of the product packages. They will also have to be trained on the different levels of engagement required at each of the levels

Implementation Consultants: This will be the biggest training lift as they will have to manage between several different configuration and training styles depending on the package sold. The new packages will likely also lend themselves to newer associate consultants training and launching primarily core clients while more experienced consultants will continue to deliver Pro and Enterprise clients

LST: LST members will have to be shown the core configurations and new reports so they are aware of these standards

CSMs: CSMs will have to be trained on the new packages and what features and usage is expected at each level

These training sessions can be done in a consecutive manner as the product packages develop with AEs and SC's being trained first (to build their pipeline) and PCs, ICs, LST and CSMs can follow. Training, training materials and timing will be developed with each team and shared with leadership as this get more refined.

Risks

Departure of Key Staff: We currently have several SMEs that are critical to hitting our timelines. With their departure the project would not be undo-able, but the timelines would be extended considerably

Sales not able to find a market for Core offering: This preconfigured space has several high performing competitors and we will need to ensure that we test our pricing and offering to effectively compete in this part of the market.

Regionalized Core Database work not approved: This second phase of the project is a continued investment in this process that needs to have the resources approved. If the resourcing is not approved then the total predicted TTL reduction capability will not be realized, on the Pro and Enterprise TLL reductions will be achieved.

Demonstrating Success

There are two key places where success can be measured:

1) Sales will be able to see an increase in their win rate due to the reduction and eventual removal of the TTL impediment from CSC. Going into this project that win rate was 6%. We are targeting a win rate of 15-25% with the changes proposed.
2) CSC will see a reduction in effort and TTL. While this reduction will take time to realize due to the backlog of classic sales in the backlog, we should be able to see iterative improvements as features are launched in Q4 2022 and moving towards the full TTL reductions on Pro and Enterprise level project in Q2 of 2023.