TRANSFORMING TO CITIZEN-CENTRIC GOVERNMENT WITH ANALYTICS
Introduction

Digital transformation has arrived for federal, state, and local government. No matter where the department—health and human services, education, tax and revenue management, from federal to local, to state, reimagining programs to become citizen-centric is the first, and most important step on the path to more responsive, agile, and connected government.

The secret to being citizen-centric is data and analytics: making every constituent interaction smarter. It means using data-driven insights to optimize how government workers engage with citizens and vice versa; measuring resolution and service levels, and better utilizing valuable caseworkers and other government employees towards better program outcomes. It means empowering government program heads to aggregate data to understand mission effectiveness, identify opportunities where teams or grantees can improve, and providing better transparency on progress to stakeholders like agency heads. Because driving mission outcomes requires empowering everyone with actionable insight, from executives to managers, to individual case workers.

Analytics at every level makes fiscal sense too, improving providing opportunities to cut waste, reduce fraud, and accelerate revenue, through more informed decisions at the point of citizen engagement.

“Digital transformation revolves around data. To be successful, public sector CIOs need to focus on expanding their data and analytics capabilities and creating a data-centric culture.”

—2018 CIO Agenda Survey, Gartner
Citizen-Centric Government Requires Data-Driven Decisions

The Modernizing Government Technology (MGT) Act became law in December 2017; technology transformation is now a priority for many Federal government CIOs. They’re transitioning aging legacy mainframes and proprietary technology to the cloud—to drive down cost, improve agility, and speed application delivery. They’re delivering consumer-grade web apps for better citizen engagement, and tapping the torrent of data to drive decision making at the front lines of government, from caseworkers, to program managers, to agency and department heads.

Public sector CIOs are moving beyond cloud and analytics to drive their organization’s mission, they’re embedding it into the DNA of the core systems that government workers use everyday—from getting metrics and KPIs into the hands of workers for better decisions at the point of citizen engagement, to using the latest advancements in AI/ML to both predict program outcomes and recommend solutions to improve results.

Source: Gartner (October 2017)
Establishing a data-centric culture, applying actionable intelligence, and continuously measuring and improving has become foundational:

- Which programs are driving the best outcomes?
- How can we improve less effective programs?
- What can we do to reach more citizens and businesses and provide better service to all?
- Where can we allocate funds, talent, and resources to improve further?
- Which programs demonstrate a need to update policy and legislation?

In this guide, you’ll learn how analytics is being used at the front lines of government—from improving program effectiveness to realigning channels, talent, and services to be more proactive and responsive to constituent needs.

The challenge of unlocking data for actionable intelligence

No surprises for government CIOs—legacy systems continue to consume IT budgets. In fact, according to IDC¹, legacy IT has steadily increased its share of government IT expenditures, now absorbing on average over 77-percent of IT budgets. For example, the Agriculture Department now spends 90-percent of its over $3BN IT budget on legacy IT, while the VA spends 88-percent of its $4.4BN budget on maintenance.

In addition to costly maintenance, legacy systems create substantial barriers to analytics for government entities, meaning the BI and the core systems live in separate silos, resulting in challenges securely collecting, integrating, and utilizing data whose variety is growing from more apps and whose volume is growing due to increased policy and legislation.

Many government legacy systems drive aging hard-to-change downstream data warehouses, or brittle reporting systems that offer little or no insight for those working at the front-lines. With data growing from new digital channels, government workers are starved of contextual, timely, actionable data for better decisions.

¹Legacy System Money Pits – Our Federal IT Budget Analysis Spotlights the Problem, October 2016, IDC
Analytics shifts to the front-lines

It’s no secret that cloud is the new center of gravity for big data analysis. But there’s a broader opportunity—integrating data-driven decision-making into the applications that government workers are using every day. Finally, providing actionable intelligence for enabling Health and Human Services caseworkers to work more efficiently based on household need or prioritize based the health and safety risk to citizens; empowering city services workers to balance requests based on cost and value; allowing USDA officials to plan inspections smarter, and FEMA agents to use location intelligence and citizen impact to prioritize.

The four keys to using analytics for citizen-centric government

**Actionable**
- Embedded insights and recommendations into systems of constituent engagement that government workers use every day, like case and contact management apps—the lifeblood of government services.

**Intelligent**
- Aid decision-making by moving beyond “what happened” descriptive analytics, to “what will happen” predictions, and AI-based “what should I do” prescriptive insights.

**Mobile**
- Delivered through the cloud, and designed for web, mobile, phone, tablet to enable government workers to securely access metrics from the agency office, to on-site.

**Unified**
- Brings together disparate web, back/front-office, and legacy data into a single cloud platform.

Shifting To Citizen-Centric Government: Measuring Programs, Service, and Talent

Unlocking The Insights To Drive Program Effectiveness

No matter your program, whether it’s providing services directly to citizens or businesses, indirectly working through other levels of government, or providing regulatory oversight, continuous outcome measurement, and reporting is the new norm to gauge and improve programs effectiveness. With government budgets under pressure and increased accountability for program directors, analytics can both help identify where programs that would benefit from improvement, and provide transparent, actionable reporting about whether the program is meeting its goals and objectives.
“Predictive analytics and rapid-cycle evaluation are analytical approaches that are used to do more than describe the current status of programs: in both the public and private sectors, these approaches provide decision makers with guidance on what to do next.”

—Brookings Institution

With an increased need for outcoming reporting, program managers face real challenges. Often, with multiple legacy systems in play, data ages out by the time it reaches program owners, limiting its usefulness to act upon. In other cases, data is not broken out by the right dimensions, or at the right level of detail to be actionable.

Putting summary, and detail in the hands of program managers helps enhance missions in three ways:

Manage program resources more effectively
- Allocate staff resources and set priorities
- Better funds justification
- Determine funding for grantees
- Set better budget projections

Motivate program teams
- Use outcome measures to motivate staff
- Create metrics-based employee performance measures
- More productive periodic performance check-ins
- Recognize high-performing offices or government employees

Faster, more targeted corrective action
- Identify problem areas and make changes
- See causes behind subpar program outcomes
- Which grantees should provide corrective action plans
- Identify where policy or legislative changes would help
- Reduce or de-fund poor performing grantees/programs
- Identify underserved citizens or businesses

Applying analytics to programs used to require an expensive, slow-to-implement and change data warehouse, and bolting together business intelligence tools, and only in the hands of a few analysts—making insights rarely actionable.

That’s changed. Modern analytics, like Salesforce Einstein Analytics, enables internal, external, and benchmark data to be easily connected to a cloud data store—no costly on-premises data warehouse required. Built-in data science enables program managers to instantly answer questions like:

- Are we meeting out program KPIs? How are we trending?
- What are the characteristics of the constituents we’re serving?
- What are our top/bottom performing grantees or providers?
- How effective are our programs, and how do they stack up against benchmarks?
- What are our predicted outcomes, and why?
- What are the characteristics of our top/bottom performing programs?

NJ Transit Taps Salesforce to Improve Performance

Every day, approximately 900,000 customers depend on NJ TRANSIT’s buses, trains, light rail, and paratransit services to get to work, school, healthcare, and recreational activities around the Garden State. When there’s a disruption in service, NJ TRANSIT—which provides more than 250 million passenger trips each year—needs to adapt as quickly as possible.

The agency relies on Salesforce to connect with individual customers and give them the specific information they need, when they need it, and help them get where they want to go, and to measure citizen experience and agent performance.

“Not only do we get real-time reporting, but by consolidating almost 55,000 cases each year, we can get more accurate reporting, spot trends more quickly, identify and fix issues.”

—Anthony Grieco, Senior Director of Customer Service & Transit Information, NJ TRANSIT
Using Analytics To Close The Citizen Experience Gap

Delivering services is at the center of government. Today’s citizens are looking for local, state, and federal government to transform their service delivery. From taxes to unemployment benefits, to small business and public housing assistance, citizens are looking for their experience to mirror the private sector applications they use every day.

They’re looking to quickly complete processes online, whether on the web or via mobile devices, and they’re looking for precise information that guides them through, step-by-step. On-the-phone they expect a convenient experience, with short wait times, easier of tracking the status of their case and informed caseworkers.

But, there’s a big gap between growing expectation and reality. A recent study of Citizen Satisfaction by McKinsey found that the top service experiences were dominated by the private sector, while public sectors services trailed, in the bottom five. The challenge for government is not only shifting systems of engagement but measuring success and outcomes.

A recent WSJ survey of state and local government officials summarized the issue, finding that 73 percent thought their organization’s digital capabilities were behind those in the private sector.

How do federal, state, and local government agencies shift citizen-service to close the gap, without putting further pressure on budgets? By using technologies and analytics that is commonplace in the private sector, like using it to utilize valuable case worker resources better, measure the success of digital channels that citizens and business are engaging with, and continually improve caseworker training and staffing to drive better service and outcomes.

“Public administrators have always been interested in identifying cost-effective strategies for managing their programs ... it’s now become feasible to employ analytic techniques used more-commonly in the private sector.”

—Brookings Institution

3 Taking A Citizen-Centric Approach to State Government, March 2018, WSJ
4 Smarter, Better, Faster: The Potential for Predictive Analytics and Rapid-Cycle Evaluation to Improve Program Development and Outcomes, June 2014, Brookings Institution
Balancing traditional and digital citizen-engagement channels

Moving government services from conventional channels to digital means measuring and optimizing omnichannel performance. The best government case managers know which channels are performing well, which require improvement and investment, and how to balance them for different cases or reasons. They have a clear understanding of which of their citizen interaction channels are most active.

Analytics enables managers and supervisors to see a clear break out of each channel of citizen engagement—phone, online, chat. It can allow them to know the number of cases closed and the percentage of cases closed the first time; the number of caseworkers working various channels; the average Citizen Satisfaction Score (CSAT) and case duration; and the portion that met program service level goals.

Manage caseworker coaching

Getting a clear perspective on individual caseworker performance and how their interactions impact CSAT is vital, so identifying top and bottom caseworkers, trends in satisfaction, and then act on coaching is crucial. Managers must be able to determine how effectively agency teams are at closing cases quickly, and if they’re heading in the right direction.

High-performing service teams are 19x more likely than underperformers to be outstanding at using analytics and insights.

–2015 Salesforce Research Study

Analytics enables managers to understand and monitor caseworker performance trends, by case type, channel, as well as operational measures like case duration, resolution rate and the volume of cases.

Equipping government caseworkers with better insight

Large caseloads and excessive workloads can make it difficult for caseworkers to provide the best service, from conducting assessments to ensuring resolution. Analytics gives caseworkers guidance so they can prioritize and have a more productive conversation. For example, see a history of citizen interactions from open cases, what other caseworkers they’ve worked with, and even recommendations on the next step to take based on previous outcomes.

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5 https://a.sfdcstatic.com/content/dam/www/ocms/assets/pdf/analytics/analytics-insight-to-action.pdf
Optimizing caseworker staffing levels using backlog analytics

Backlog analytics empowers supervising managers to create a caseworker resourcing, training, and digital channel strategy based on understanding trouble spots, like specific case types that consume case worker resources.

For example, waterfall visualizations can provide visibility on whether the backlog is growing or declining, understanding the percentage change, and days it will take to clear. Comparing new case volume versus prior periods based on different dimensions enables supervising managers to allocate and train case worker resources to manage incoming volume efficiently.

The State of Colorado Uses Analytics to Gain More Transparency into its Benefits System

The Colorado Benefits Management System (CBMS) is used by more than 5,000 county and medical assistance site employees across the State of Colorado to determine an individual's eligibility for assistance. The prior legacy IT system hindered the state's ability to respond to citizens in a timely manner, while also costing taxpayer dollars.

By moving CBMS to Salesforce, Colorado gained a modern and agile system that enables county employees to more quickly respond to customer service inquiries and process applications for food, cash, and medical assistance, resulting in a better experience for citizens.

Analytics automate reporting and provide a deeper understanding of CBMS data and performance at both the state and individual county levels. Dashboards deliver insight on CBMS KPIs such as staff workloads, how long it takes to process new applications and where applications are getting backlogged, empowering state and counties to make better decisions, more effectively manage their employees and find ways to continually improve operational efficiency.

“Our mission is to leverage next-generation technology that makes it easier for our citizens to engage with their government. By modernizing CBMS, we’ll be able to provide more transparency around performance, implement new ideas faster and provide a better service experience for our citizens.”

—Suma Nallapati, Secretary of Technology and Chief Information Officer, State of Colorado.
The Einstein Analytics Advantage

Einstein Analytics is different because it’s completely mobile, AI-powered, contextual, and is available in the Salesforce Government Cloud, so government workers at every level can make smarter decisions and act faster, all based on the latest data science. Because it’s native to Salesforce, teams get insights infused into every workflow and can analyze data from any source. Then they can take action on those insights without ever leaving the page.

With prebuilt connections and data flows it’s never been easier to analyze Salesforce data, and unlock data across legacy government systems, or siloed cloud apps, for a complete integrated view of programs, constituents, and service.

Connected

Government workers can take action on insight infused into their standard work processes, like instant insight into team performance, prioritization, resolution efficiency, and service levels. Embedded into the case management apps and other applications they can use every day, for better decisions at the point of engagement.

Intelligent

Unlike traditional tools, Einstein Discovery helps program managers quickly sift through vast amounts of data, enabling them to make smarter decisions with transparent, AI-powered predictions and recommendations. Then it generates answers, explanations, and recommendations in a way that’s easy for agency heads to understand.

Complete

Get started in minutes with customizable Analytics Templates, or build flexible dashboards from scratch that provide government workers with instant visibility into satisfaction, case volume, team performance, and trends across all channels.

Mobile

High-performing teams are 3.5x more likely than underperformers to use mobile reporting tools to analyze data extensively. With Einstein Analytics, government workers have access to data at their fingertips and can act on insights from anywhere, to make data-driven decisions from the agency office to out in the field.
Platform

Data preparation tools allow analysts to manipulate and clean data from anywhere quickly, and a visual data flow designer simplifies the entire process. Modern APIs enable analytics to be embedded in any web application.

Government-Ready

Because Einstein Analytics is built on Salesforce, you benefit from every aspect of our CRM platform: trust, scalability, security, and continuous upgrades. Part of Salesforce Government Cloud, Einstein Analytics, has compliance with comprehensive privacy and security standards and certifications, including some of the following:

FedRAMP (Federal Risk and Authorization Management Program)
Salesforce Government Cloud is a partitioned instance of salesforce.com's multi-tenant community cloud infrastructure, specifically for use by U.S federal, state, and local government customers and other government-related entities.

Defense Information Systems Agency Impact Level 4 (IL4)
Certification provides DoD mission owners and authorized contractors the ability to utilize the Salesforce Government Cloud.

Salesforce Government Cloud also complies with HIPAA and is compliant with the world's most demanding security and auditing standards including:

- NIST Special Publication 800-171
- PCI DSS Level 1
- ISO 27001/27018
- SOC 1/SSAE 16/ISAE 3402 (formerly SAS70)
- SOC 2

Conclusion

Federal, state, and local city government run Salesforce, from the USDA, VA to the GSA. Einstein Analytics enables government workers and program managers to see and act on all their data and make better decisions with AI-powered answers, explanations, and recommendations, all from anywhere, any device. It's analytics for the next wave of citizen-centric government transformation.

Learn more.
THANK YOU.