



## Case Study: Loudoun County

# Business Process Review Provides Lessons for Successful Implementation of Citizen Request Management Solution

## Background

Loudoun County, located 25 miles from Washington, D.C., is a rapidly growing center for technology, communications and transportation. The region's 275,000 residents enjoy an excellent standard of living, as evidenced by surveys that report high levels of satisfaction with county services.

## Challenge

While citizens have a high opinion of the county's efficiency, the experience was a bit different from an internal perspective. Like many cities and counties, Loudoun County had no formal system for tracking citizen requests; some divisions were still relying on hand-written records while others used incompatible databases created in programs like Microsoft Access. This lack of integration made sharing information and coordinating activities error-prone and presented communication challenges.

"The divisions worked with each other, but they would only realize that when they started talking after running into each other in the hallways, or by voicemail, or by email. You would hear zoning was working on an issue that engineering was working on too, but neither really knew the details," says Mary Terpak, program specialist in the County Administration office (now retired).

Resource management was just as inefficient. "We might know how many cases we had in total, but we had no easy way to determine how many cases each person had, whether a staff member was overloaded or if we needed to move staff to another area. The only way we could do it was by counting file cards."

## Solution

County Administration decided that installing a citizen relationship management system would be the best way to streamline operations and improve coordination between divisions. After reviewing responses to their request for proposals, the county's proposal analysis group unanimously selected Active Network, Government and its Active Citizen Response (ACR) solution.

## Customer at a Glance

**Customer:** Loudoun County, VA

**Solution:** Citizen Request Management

**URL:** [www.co.loudoun.va.us](http://www.co.loudoun.va.us)

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– Mary Terpak, Program Specialist,  
County Administration Office,  
Loudoun County

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### Tips on a Successful Implementation:

- ▶ **Be aware of how long it can take to finalize a contract.**  
“Negotiating a contract can be a time-consuming process that involves very carefully detailed discussions on technical aspects and costs, and we had four RFPs running concurrently,” Troxell says. “Our timeline for the CRM system fell behind because it was stacked up behind the others.”
- ▶ **Encourage involvement from the affected parties.**  
Terpak notes, “All divisions who were going to be using the system were involved in the process. Each division sent representatives to see the demos, and about half of them were involved in our proposal analysis group.”
- ▶ **Maintain continuity.**  
All members of the proposal analysis group continued to be involved in the implementation process, which has kept things moving smoothly.
- ▶ **Build support among staff** by emphasizing the benefits they will achieve.
- ▶ **Ensure you are confident that business processes are correct before applying technology.**
- ▶ **If it’s not broke, don’t fix it.**  
“None of the divisions had to change the way they do business, which was crucial for buy-in.” Terpak says.

### Implementation

“We went into this with a pretty good idea of what we needed, and I think we found a vendor that has all of that,” Terpak says. “We liked the responsiveness, the capable people, the experience of Active. They were willing to work with us to develop solutions to meet our needs.”

One of the things that set Active apart from the other vendors, and the reason why it was able to cater a solution to the county’s needs, is its ability to conduct a thorough Business Process Review. The Business Process Review begins with a series of meetings between an Active consultant and staff in divisions affected by the system’s implementation. Through these meetings, all parties were able to gain a better understanding of the county’s work processes and share ideas on how the ACR system could be used to maintain and improve them.

“Active’s consultant did a great job of working with the departments, talking to them, and analyzing their needs. I’ve enjoyed watching him take all these diverse divisions and showing them what their commonalities are.” Terpak says.

A particularly important part of the Business Process Review was documenting work processes and databases used by the divisions. Using technology to automate workflow only works if business processes are what they should be. By better understanding workflows and having them incorporated in the ACR system, the county could streamline its operations and maintain them despite Terpak’s pending retirement.

“County Administration is often the intake point for citizen comments, questions or complaints for other departments. The person who was primarily responsible for that was retiring, which meant that institutional knowledge was going to be gone.” says Gene Troxell, director for information technology. The Business Process Review enabled the county to capture this knowledge and use it to automate request routing based on the nature of the request. As a result, the county could provide a smooth transition for new staff while continuing to reliably help the customer.

Another important aspect of the Business Process Review is its ability to build buy-in among staff reluctant to change their current work habits. A successful implementation is the product of a partnership between all parties, and the Business Process Review helps end users feel involved and identifies and addresses any concerns they may have.

“The first question everyone asked was, ‘Will we have to change the way we do things?’ The answer was, ‘No, you don’t, because we’re getting a system that won’t make you change unless you want to,’” Terpak says. “We had a couple of reluctant individuals, but now they understand how life’s going to be easier with this.”

The insights gained from the Business Process Review helped Active and Loudoun County to configure the ACR system to automate their sound business processes and to develop an implementation plan that would make the transition to the system as smooth as possible.

“I sensed a growing enthusiasm as we went along on the project. I’m personally comfortable with the selection and the vendor, and where we are in the implementation process. I’m very excited to see it work.” Troxell says.