SimpliGov Gives Cupertino the Luxury of Time

Workflow Automation Saves 2,000 Hours Per Month and Counting

In the heart of Silicon Valley, the City of Cupertino is the headquarters to many businesses, including Apple, and home to close to 60,000 residents. The city's 200–plus employees are constantly updating internal processes used to deliver a wide variety of services to constituents.

CHALLENGE

At the onset of the COVID pandemic, Cupertino jumped into the world of digital forms with both feet, initially turning to Microsoft 365's Power Automate™ capabilities. While Power Automate's features were vast, it came without any form templates, and in many cases, it wasn't obvious how to optimize them. The staff lacked the time and technical expertise to learn all of the form field options and complex workflow nuances. Moreover, each worker built their forms differently. Thus, no standardization could be established.

The real difficulties came after digital forms were created. Cupertino had no central location to track the scores of forms circulating among many different departments. They could be stuck in one employee's inbox, in the organization's SharePoint™ database, or lost. The forms that did make it to final approval had to be manually converted to PDFs and saved in the city's document management system.

"**Collectively, we often found ourselves asking, 'Where's that form**?'" said Teri Gerhardt, Innovation Technology Manager, City of Cupertino. "**We spent an inordinate amount of time hunting down approvals and documents ourselves**."

SOLUTION

Cupertino sought a platform that was built for novice users, equipped with thorough tracking capabilities, compatible with existing systems, and able to go live fairly quickly.

The SimpliGov platform met all of Cupertino's requirements. Its template library enabled employees to select fields and layouts that were appropriate for their particular business process. In addition, it is integrated with Cupertino's SharePoint and Laserfiche™ document management systems.

Forms that require reviews by any number of people can be systematically routed to the next person through the SimpliGov platform with an auto–generated email alert.

Now, when employees open specific forms (e.g., petty cash reimbursement requests), SimpliGov automatically populates their basic information from SharePoint, saving time and eliminating errors. An immediate supervisor then verifies the employee submission and receipts. From there, the submitter schedules a meeting with the finance department where multiple parties sign the form and the cash is exchanged.

Critical to maintaining a standardized and current library of forms, the Laserfiche integration ensures that all finalized forms are instantaneously archived in PDF format. Moreover, the SimpliGov dashboard can identify where a bottleneck may be holding up a process and take appropriate action.

RESULTS

With Cupertino employees spared bureaucratic duties, the group of SimpliGov-powered workflows (approximately a dozen) are collectively saving the city **nearly 2,000 hours per month**. Furthermore, there have been **no errors in processing submissions**, a significant improvement over the previous error-prone process.

In addition to petty cash reimbursement, Cupertino has SimpliGov has automated a range of workflows touching many departments, including:

- Key card authorization and activation

- Emergency contacts

- Workplace violence prevention training

- Record destruction authorization

- Procurement

- Service center invoices

- Employee separation checklists

- Park ranger log

Employees feel empowered now that they have a tool that enables them to design and implement their own forms and workflows quickly.

> **"There's a line of employees around the corner looking to convert their existing forms and processes using SimpliGov...everyone sees the benefit."**

Teri Gerhardt
Innovation Technology Manager, City of Cupertino