



This white paper presents a brief case study on how Natural Resources Canada, a Canadian Federal Agency, applied a “Digital Strategy” for an agency wide roll-out of its public facing electronic services for grants, contributions, and regulatory programs

# Implementing Digital Strategies to Modernize Client Service Streams for Government



# Government agency implements a digital strategy to modernize client service streams with Dynamics CRM

Natural Resources Canada (NRCan) is a Canadian federal government agency that seeks to enhance the responsible development and use of Canada's natural resources and the competitiveness of Canada's natural resources products. NRCan provides a range services to Canadians, in support of this mandate including energy efficiency programs, climate change programs, sustainable forest management, sustainable mineral management, earthquake research grants and funding.

## Modernization Challenge

As with many government agencies, over time, NRCan has developed a variety of data base applications that support the many services it provides to Citizens. At the same time, increased public demand for Internet based services is creating pressure for NRCan to implement a "Digital Strategy" to provide consistent electronic service delivery, across all service areas to improve service delivery to its clients. NRCan determined that the extensive range of legacy database software applications supporting its business areas for grants and funding programs, regulatory programs, and internal services, were increasingly expensive to maintain. Moreover, the legacy technology base would not support a modern digital strategy to improve the efficient delivery, and effectiveness of their programs and services.

## Solution

NRCan implemented a Digital Strategy to modernize its service delivery systems. They selected the GCCase platform, a government-wide client and case management platform based on Dynamics CRM as a technology platform capable of supporting an agency-wide digital service strategy. They applied an enterprise automation approach to migrate existing legacy service delivery database applications to the new platform resulting in single technology platform for the management of all services, with a public facing intake portal to engage citizens online with its programs and services.

## Enterprise Onboarding Approach and Best Practice Highlights

In reviewing the agency business services, NRCan recognized that there was common functionality across the many business services it delivers. For example, NRCan's grants and contribution programs operate with a similar end to end process, from the initial intake of grant applications through to the release of funds to recipients. Its regulatory programs also followed a similar approach to delivering services with the intake of regulatory applications, followed by assessment and various case management activities. In addition, these many service delivery applications, shared common data elements such as client profiles, business profiles, etc...

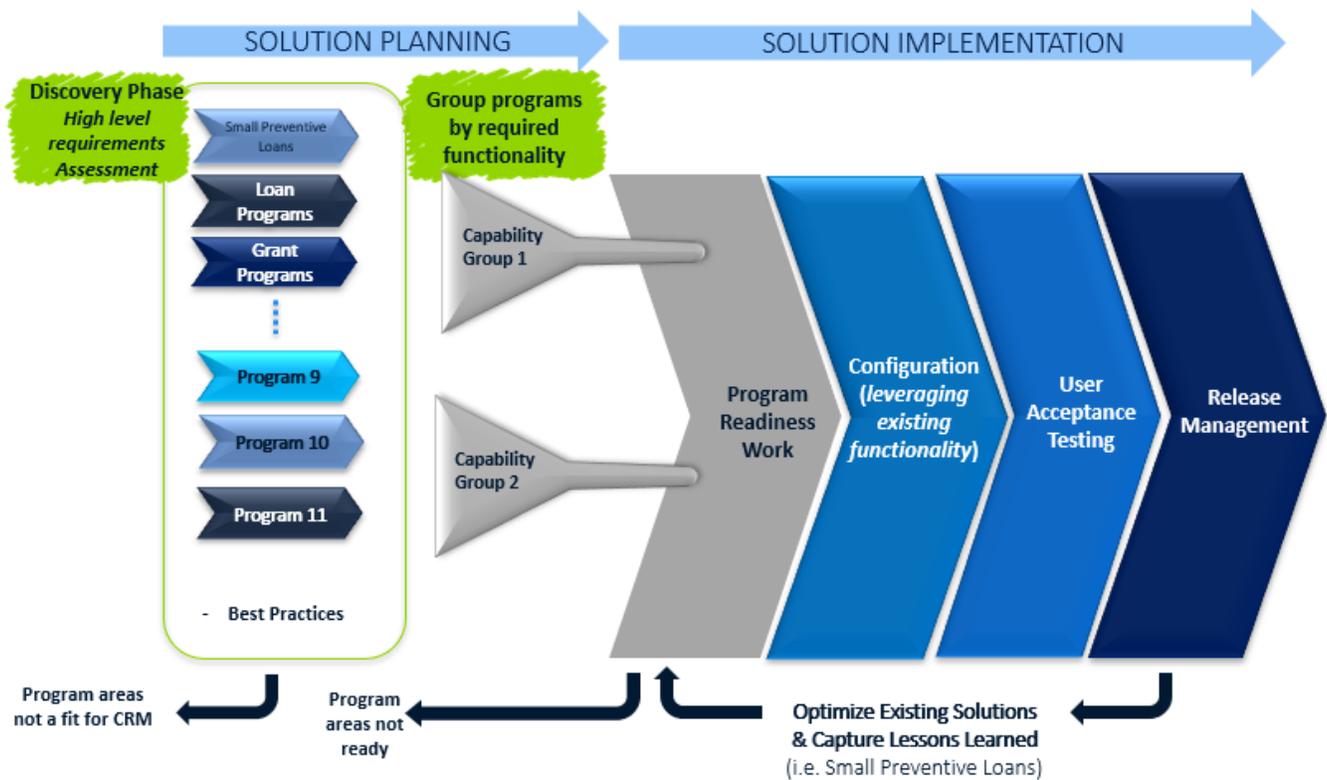
*What is a Digital Strategy? A digital strategy is a plan for maximizing the business benefits of data assets and technology-focused initiatives. A successful digital strategy requires a cross-functional team with executive leadership, marketing, and information technology (IT) members. It involves breaking down the silo between information technology leaders and those of other customer-facing services to deliver a consistent digital customer experience.*

For this reason, NRCan applied an enterprise implementation approach to identify this commonality, and to encourage the re-use of software and data across its many business area solutions. NRCan established a project team consisting of internal IT staff, and an external vendor with specialist skills for implementing Dynamics CRM. The team worked together to implement an agency-wide service delivery platform. Highlights of this enterprise approach are provided below:

business areas would be supported on the target Digital Services platform; and a road map for onboarding all solutions into production.

### Business Solution Onboarding Process

The Project Team initiated an onboarding process to guide each business solution candidate on to the new platform. This process included an end to end cycle, from business requirements assessment, through to training, and finally to a release of the solution to end users.



### Business Solution Planning

The Project Team initiated the project with a business solution readiness assessment to assess candidate business areas that would potentially benefit from the new platform. This high-level discovery and review, of each business area within NRCan, allowed the team to group the business into common capabilities (i.e. grants programs) and further identified the complexity involved in migrating existing business service areas to the new digital services platform. Key outputs of this phase were: a prioritized list of business areas ready for onboarding to the new platform; a business architecture that provided a component view of all

This onboarding approach allowed NRCan to release solutions for business areas early, and on a timeline that aligned with business priorities, while ensuring a continuous capability grouping and re-use assessment, to promote commonality across business areas. This resulted in the integration of all business solution areas on a common solution architecture. Key outputs of this phase included:

- an operational, agency-wide CRM platform supporting NRCan business service solutions;

- a business architecture supporting the re-use of common business capabilities;
- a common re-usable solution app for grants and contributions;
- a common client profile database; and
- a common digital service intake portal service for registering clients and receiving applications to NRCan services.

### Continuous Digital Strategy Architecture Review

With the onboarding of each business solution the Project Team applied a continuous architecture review activity to ensure that the underlying software solution components and data model continued to support the design objectives of the NRCan Digital Strategy. Objectives included the corporate need for a single client profile for each individual or business accessing NRCan services, a client history for returning clients, a common view of all services online, client engagement features to ensure a consistent and intuitive client experience.

### Key Benefits and Successes

The main business benefit for NRCan has been the reduction in paperwork which has allowed staff to manage their caseloads more effectively, and to have increased electronic engagement with clients. Staff can now use the system for every point of contact, from an initial online service request then through the complete cycle of service with each client, regardless of the service type. “This has resulted in a full trace of decisions, communication and activities with clients.”

Early success was another benefit of NRCan’s solution implementation approach. The project Team was able to establish an agency-wide platform, and onboard the first program service within seven months. Since the initial implementation NRCan now continues to ramp-up additional business areas, with expedited timelines. In particular, NRCan has been able to leverage its re-usable solution app for Grants & Contributions to launch a new program in to full operation in under four weeks!

This project has resulted in a sustainable technology platform the provides NRCan IT staff with the ability to future-proof its Information Technology investment for

the strategic automation of digitized online services to its clients.

Another benefit of this new digital services platform is that it streamlines NRCan service delivery, improves efficiency in program delivery, and leads to better program results for Canadians. “NRCan can now process large quantities of service requests in less time.”

NRCan has successfully implemented a cloud-ready foundation supporting an agency-wide Digital Strategy to evolve NRCan electronic service delivery into the future, with a high-quality customer experience. Through this responsive digital platform, based on an advanced client and case management technology platform, NRCan can onboard a new electronic service, for a business area, in under 4 weeks, or enhance existing electronic services, as required, to meet the ever-changing objectives of the Agency.

#### About the Author

*The author has developed this paper to encourage a dialog on best practices in Digital Strategies for the Public Sector. He welcomes feedback on this paper as further input to the research process.*

#### Eric Alain, Enterprise Architect

*Mr. Alain is the CEO of Eperformance Inc. His 30 year career in government automation is highlighted by last ten years which he has spent developing an international practice in the area of CRM based Digital Strategies for the Public Sector. In conjunction with Government program professionals, he has participated in the development of standards and better practices in this specialty area. Mr. Alain has focused his efforts to assist government organizations in the design and application of methodologies and technologies aimed at streamlining the grants & contributions program delivery process through automation. His experience has led to in-depth involvement with many government standards, e-Gov initiatives, and better practices that impact grant and funding programs at all levels of government.*

*Tel: (613) 656-1821  
ealain@eperformanceinc.com*

#### Eperformance Inc.

*Eperformance is a digital technologies firm specialized in portal, grants, contracts solutions across both large enterprise and the public sector, for general inquiries on our services and communications please contact Devin Murphy.*

*Tel: (613) 656-1817  
dmurphy@eperformanceinc.com*