

# CASE STUDY

## A Record-Setting Strategic Plan



### HOW ONE PUBLIC UTILITY FOUND A KEY TO ENTERPRISE DIGITAL TRANSFORMATION

The Brownsville Public Utilities Board (BPUB) was formally chartered by the city of Brownsville in 1960 to provide end-to-end electrical, water, and wastewater services to its customers in the rapidly growing Rio Grande Valley region of Texas. That is a big agenda for the City-appointed seven member Board and the 600 employees who make up one of the largest municipally-owned utilities (MOU) in the state and country.

When BPUB's Five-Year Strategic Plan honed in on the need for improved records management, no one thought that fulfilling this one small aspect of the plan could deliver so

### ISSUE

Digital transformation of more than 100 identified processes for the end-to-end delivery of electricity, water, and waste water services

much. Like most people, BPUB stakeholders were used to thinking about records in a way that is rooted in the paper-based processes of the past, not in a way that reflects the digital transformation that is rapidly revolutionizing commercial businesses and government agencies today.

Records Management was included in the Strategic Plan because the Board and Executive Team value transparent government and regulatory compliance. Other aspects of the Plan included optimizing business processes and delivering more value to BPUB's customers, but no one immediately connected the dots between the business processes BPUB wanted to optimize and the records that supported them. Viewing Records Management as something separate from

### SERVICES DELIVERED:

- Contracting Process Support
- Current State Analysis
- Demonstration Planning and Facilitation
- Pilot Project Definition
- Requirements Development
- RFP Development and Evaluation
- Software Market Capabilities Summary

their other initiatives, BPUB issued an RFP for assistance with defining requirements and then guiding them through the procurement of a Records Management system. After a competitive process, this three-phase engagement was awarded to Access Sciences.

## THE ROLE OF EXECUTIVE STRATEGY

Early in the project, Access Sciences facilitated an Executive Strategy Session to ensure alignment on the project's objectives. Much of the discussion was focused on the fact that, like most organizations, BPUB's information architecture was scattered across numerous, siloed operational systems. Personnel were forced to move from one system to another to find what they needed, and then filled the gaps between systems with manual processes that generated lots of paper. Executives were concerned that this was not just a legacy problem, as many departments wanted to procure isolated cloud-software solutions to meet their specialized needs.

When asked to describe "what successful Records Management looked like," the Executives said nothing about dusty records locked in back rooms. Instead they focused on the time when each record has the most impact on business processes and performance, and about digital transformation of the business and the inseparable role of records. To BPUB Executives, a successful records management initiative would:

- Centralize information and reduce data duplication
- Transform scores of paper processes
- Automate operational reviews and approvals
- Improve efficiencies enterprise-wide

## Gathering Requirements Enterprise-Wide

BPUB employees already understood the importance of records, but that did not mean they would be excited to meet and talk about the subject. Generally, people are most interested in how they can do their job better and more efficiently—two things that did not seem related to learning how and when to handle records.

However, armed with the outcomes of the Executive Strategy Session, our project team was able to change the focus of employee interviews from "how can we help you to declare records?" to "how can we help you be more productive?" A Communication Plan, developed

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## SOLUTION

- ☑ To clarify the synergy between separate initiatives and strategies and unite the records management requirements with digital transformation across the enterprise
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## BENEFITS

- ✓ Centralized Information
- ✓ Reduced cost and complexity of multiple cloud solutions
- ✓ Process automation and improved efficiency

at the beginning of the project, ensured that every department manager was aware of the potential to transform business processes, and of the value that would come from interviews.

The resulting interview sessions were voluntary but very well attended. Business requirements were gathered from more than one hundred subject matter experts who represented every BPUB department. The business requirements were identified, prioritized, and added to the records management requirements that had already been assembled by the project team. After Executive

review, the project was ready to move into the Procurement Phase.

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## FINDING THE RIGHT PATH FORWARD

BPUB issued a Request for Proposal (RFP) for an Enterprise Content and Records Management System, with a strong emphasis on electronic forms and automated workflows. Access Sciences designed the RFP Requirements, Demonstration Script, and Pilot Scope of Work to ensure that every potential vendor was able to show exactly how their system could meet BPUB's goals.

After RFP responses were reviewed and finalists were selected, it was important to maintain the momentum that had started during the departmental interviews. This was accomplished by separating the half-day demonstrations into three sections, each targeted to a different group of Stakeholders who were drawn from the departments. These focus-group style demonstrations provided the opportunity for department representatives to express their opinions about each vendor, with the final choice being unanimous across departments and within the Project Team.

## A TRANSFORMATIONAL OUTCOME

BPUB is engaged in a true enterprise rollout that will transform business processes across and within each department. The deep experience that Access Sciences brought to the project spanned utility operations, management of critical records, and digital transformation across the organization. This was just the set of skills required to help guide a procurement that delivered exactly what the Executive Strategy had envisioned.

