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Permit Software Buyer's Guide

Everything you need to know

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What you'll learn in this guide

With so many choices and opinions, choosing the best-fit permit software for your organization can feel overwhelming. There isn't a one-size-fits-all solution, and if you're like most government staff, this might be the first and only time you've led or taken part in a permitting system replacement. *So, where do you start?*

In this guide, we answer the most common questions governments on the same buying journey ask. **You'll learn everything there is to know about the different types of permitting software and how to buy and successfully implement the right system for your needs.**

What is permit software?

Permit software is a solution for governments to better manage and track everyday processes related to the management of permits and licenses, and may be cloud-based or hosted on-site. At its core, it's designed to eliminate most or all manual regulatory processes with features that support a fully digital end-to-end permitting process, from application through to issuance.

Cloud or on-premise software?

What's better? Though governments have tailed behind the private sector in their adoption of cloud software, according to a recent [FedRamp survey](#), **70% of state and local government executives now highlight the cloud as their preferred environment for hosting citizen and mission data.** And it's clear why.

With pressure to do more with less, sky-high citizen expectations for easy online government services, and ever-changing rules, regulations, and demand, the flexibility and cost savings of cloud-based solutions make them the top choice for modern organizations.

Comparatively, on-premise systems don't scale, aren't agile, and require constant updates and maintenance. They simply don't work long-term.

It's better to be prepared with a cloud-based system that can be updated without a heavy lift from IT or system integrators.

Here's a closer look at how SaaS (software as a service) cloud solutions and on-premise systems compare:

	Cloud	On-Premise
Scalability	Infinitely scalable to meet as many users and departments as required.	Limited scalability. Increased hardware investment required to scale infrastructure.
Hosting	Everything, including data and applications, is hosted in the cloud by a third-party provider.	Installed on an organization's on-premise servers making it vulnerable to network outages or other security issues.
Data Storage	Data resides with the third-party provider. It's always available, backed up, and secure.	Data located within in-house servers and IT infrastructure. Data backup is the agency's responsibility.
Security	Regarded as one of the most secure forms of application and data management, with providers required to adhere to many national security standards such as FedRAMP, MIST, SOC Type 2, and others. Learn more about government cloud security [here](#).	Vulnerable to the level of security managed by IT for application, network, and organizational risk exposure, including additional costs.
Service Continuity	Offers protection against network outages, security breaches, and other unforeseen events. All you need is an internet connection to access your solution from anywhere.	Vulnerable to organizational security breaches and service outages.
Total Cost of Ownership	Lower total cost of ownership - users only pay for the resources they use.	Higher total cost of ownership: maintenance costs, hardware, power, staff time, and space.
Ability to Make Changes	Highly configurable systems require minimal to no customization for changes, integrations, or updates, and are infinitely scalable.	Heavily reliant on customization for any changes, integrations, or updates — not scalable without considerable work.
Demand on IT Resources	Most maintenance can be performed by department staff.	Demanding on IT staff to maintain the solution.
Licensing	Pay-as-you-go models: software-as-a-service models (SaaS).	Requires a software license that will eventually require additional costly infrastructure and major upgrades.

Use cases

Permitting software can be used for small, specific use cases like special use permits, or as a do-everything solution for community development and licensing. Depending on your solution of choice and its offered functionality and flexibility, you can use it for as many or as few use cases as you want, which include:
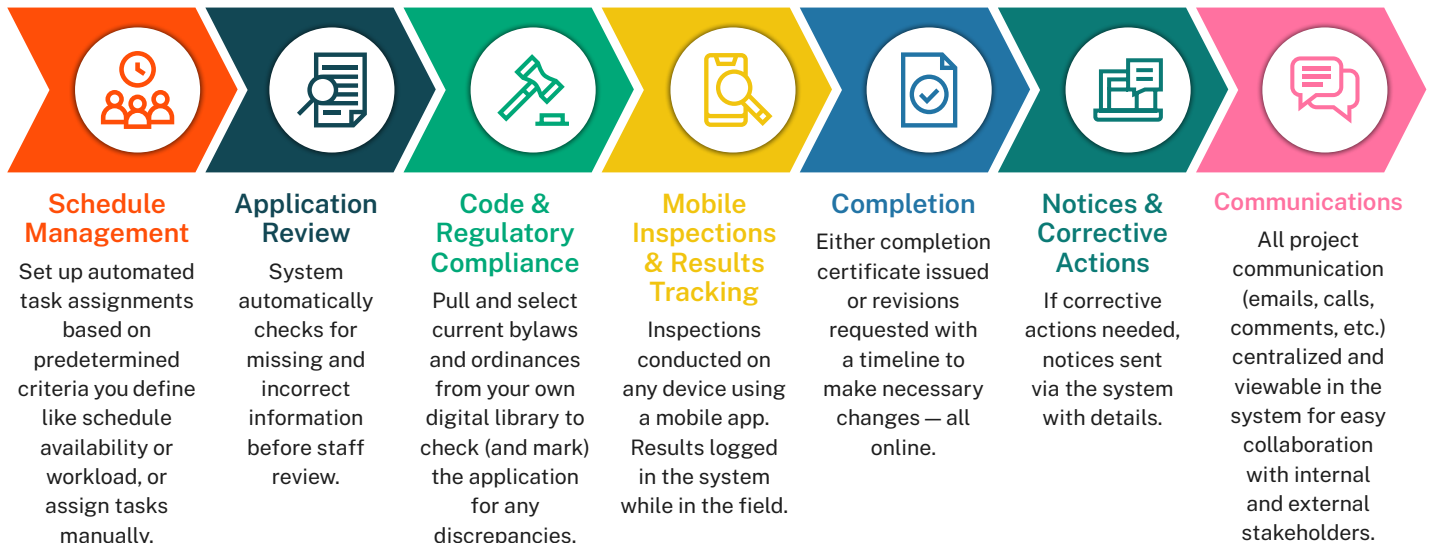

Community Development · Building Permitting · Planning · Code Enforcement · Inspections · Environmental Health · Licensing

You may choose to manage all or one of the above with your new solution. With the most flexible platforms, the core functionality is there and ready to go, you just need to mold it to make it your own. The platform serves as the foundation and what you add or don't add (including helpful integrations and other tools) is up to you.

How it works

Every system is different, but to give you an idea of how permitting software works, here's a snapshot of everyday workflows using Clariti:

Planning

Schedule Management
Set up automated task assignments based on predetermined criteria you define like schedule availability or workload, or assign tasks manually.

Application Review
System automatically checks for missing and incorrect information before staff review.

Code & Regulatory Compliance
Pull and select current bylaws and ordinances from your own digital library to check (and mark) the application for any discrepancies.

Mobile Inspections & Results Tracking
Inspections conducted on any device using a mobile app. Results logged in the system while in the field.

Completion
Either completion certificate issued or revisions requested with a timeline to make necessary changes — all online.

Notices & Corrective Actions
If corrective actions needed, notices sent via the system with details.

Communications
All project communication (emails, calls, comments, etc.) centralized and viewable in the system for easy collaboration with internal and external stakeholders.

Building Permitting

Permit Applications
- Customer completes pre-application checklist via the Permit Guide and receives detailed instructions on how to apply.
- Application via the online portal.
- Customer follows guided application steps and uploads documents.
- Next steps outlined for full process transparency.

Submissions & Fees
- System checks to ensure application is complete.
- Fees calculated automatically.
- If application is complete, fees paid and application submitted.

Review Cycles
- Application added to permit queue.
- Review tasks automatically assigned and scheduled.
- Plan review via ePlanReview integration.
- Communication with applicant via portal.

Permit Issuance
- Permit approved and issued.
- Option to download or print permit via the online portal.
- Automated time stamping and expiry tracking to notify applicant.

Site Inspections
- Customer requests inspection via the portal.
- Inspections assigned and scheduled based on rules you define.
- Inspections recorded in the field using any device (available offline).
- Access to prebuilt inspection templates to save time.
- Alerts sent with results.

Certificate of Occupancy Issuance
- Occupancy Certificate issued with noted conditions.
- Accounts receivable via the financials module.
- Project closed and archived.
- All historical data saved and attached to the permit record.

# Code Enforcement

Complaint & Case Research
- Find all information to research a complaint or case on one screen.
- Look up and analyze historical complaints and records using search filters for region, user, encroachments, and more.

Inspection, Investigation & Violations
- Use a mobile device or tablet to conduct an inspection or investigation from anywhere whether you're online or offline.
- Add pictures and comments from the field.
- Automatically schedule follow-up inspections based on results.

Citations & Fines
- Use prebuilt templates to issue citations, warnings, and fines.
- Fees are calculated automatically.
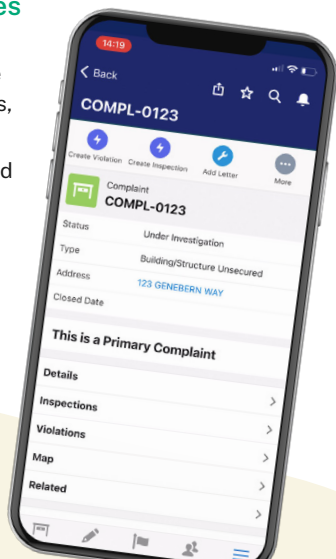
Inspections

Scheduling & Assignment
- Requested inspections automatically assigned and scheduled based on rules you define (or scheduled manually).
- Optimal daily travel routes created using GIS map viewer.

Task Management
- Other tasks assigned based on chosen criteria.
- Known data populated automatically to reduce manual entry.

Plan Review & Collaboration
- Plans reviewed electronically.
- Data shared between eplanreview software and permitting system.

Correspondence & Corrections
- Automated notices and any required corrections sent to the applicant via the portal.

Approval & Release
- Once inspection marked as complete/passed, next steps are automatically triggered in the system.

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Features and functionality to look for in a solution

When scoping out a permitting solution, look out for these **7 core features** to ensure your team is set up for success. Of course, there are other helpful features for different use cases, but your chosen permitting solution should offer the below at a minimum.

① Online Application Process

Many solutions offer an online portal that supports a completely digital permit application process. But for the majority of applicants, this alone doesn't help them understand what documents they need to submit, the complex rules and regulations they need to adhere to, or the actions they need to take at each step.

For the best experience, and to reduce pre-application questions and submission errors, you should complement your portal with a permit guide: a tool that asks each customer unique questions that are used to generate a manual of personalized application instructions. Used together, you can make every customer a permit application pro, even if it's their first time.

Following their personal set of application instructions, via the portal, customers simply pick from a drop-down list what permit they want to apply for; click through the guided application steps; attach all necessary documents; pay the assigned permit fee using credit, debit, or another payment method of their choice; and submit for review. Then, once submitted, they can log back in at any time to track the status of their application, or make any revisions before being notified by staff to complete next steps. Everything is completed and stored in one centralized online location, so developers and other applicants can find the information they need without contacting your staff (or lining up at city hall).
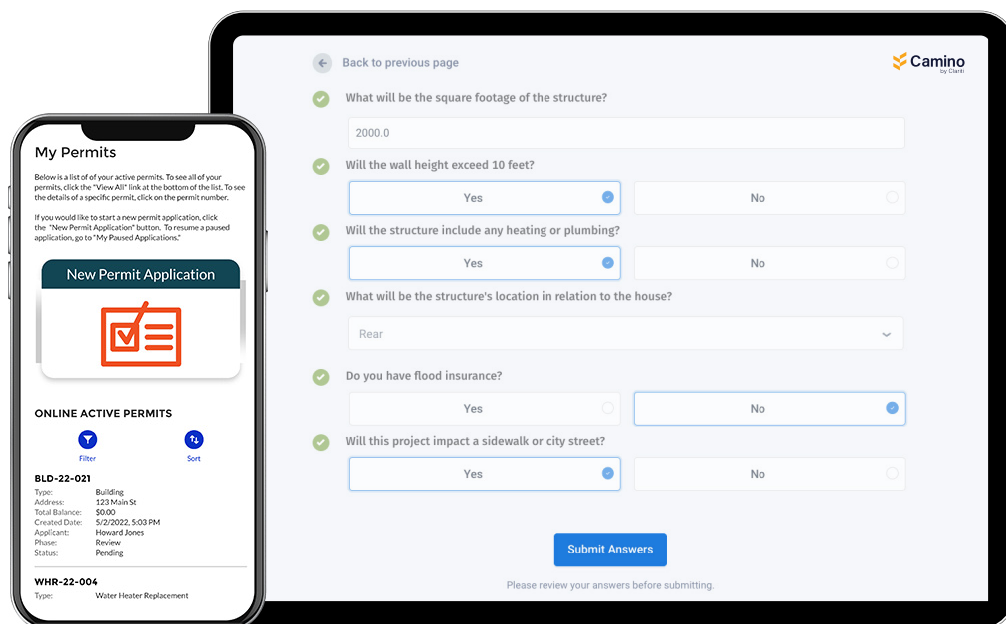
Online Portal (left) and Permit Guide (right)

Analytics & Reporting

Consider platforms that offer simple but powerful analytics and reporting capabilities that help you harness your data to improve performance and make data-backed decisions. Ideally, you should be able to drag and drop your data into real-time dashboards for different departments, or into reports to fulfill requests from council, other levels of government, or your local home builders association.

Process Automation

All permitting systems offer a way for you to automate time-intensive workflows and repetitive administrative tasks to help save staff time. Every solution is different, but with the most intuitive, low-code/no-code platforms, you can create unique processes and workflows in minutes by dragging and dropping different fields into place. All it takes is a few clicks to configure a new permit type, workflow, requirement, or fee (just like Orange County did here).

Mobile Inspections

Look for mobile inspection capabilities that enable your inspectors to take their office into the field. Everything they can access on their office computer - like assignments, daily itineraries, plans, and all other land parcel information - should be accessible via a mobile device or tablet, even if they're offline.

Property History

Make sure you can find out everything you need to know about a project or property from one screen in your system's back office. You should be able to search by address or land parcel to get a 360° view of current and historical information like applications and their statuses, any related inspections, complaints, violations, enforcement actions, and more. It should only take one click to navigate between project tasks and records.

Correspondence Tracking

Reduce repetitive admin work with a solution that offers the ability for staff to automatically create, track, and send everyday correspondence and materials like emails, permits, violations, and public notices.

Some permit software systems enable you to create templates for common emails/materials that can be sent automatically, send and track all back-and-forth communication related to a permit record on one screen, and even track whether or not an email sent to a customer was opened.

With all meetings, communication, and tasks tracked and attached to a permit record in your system, you can easily see how and why a decision was made, and quickly pick up work where someone else left off.

Financials

Look for comprehensive capabilities that allow you to manage and track permitting-related financial workflows and transactions from end-to-end within your solution, including cashiering, accounts payable, accounts receivable, subledger accounting, and online payments. You should also be able to easily connect to your existing financial system and/or ERP solution to ensure data accuracy and seamless collaboration with your accounting department.
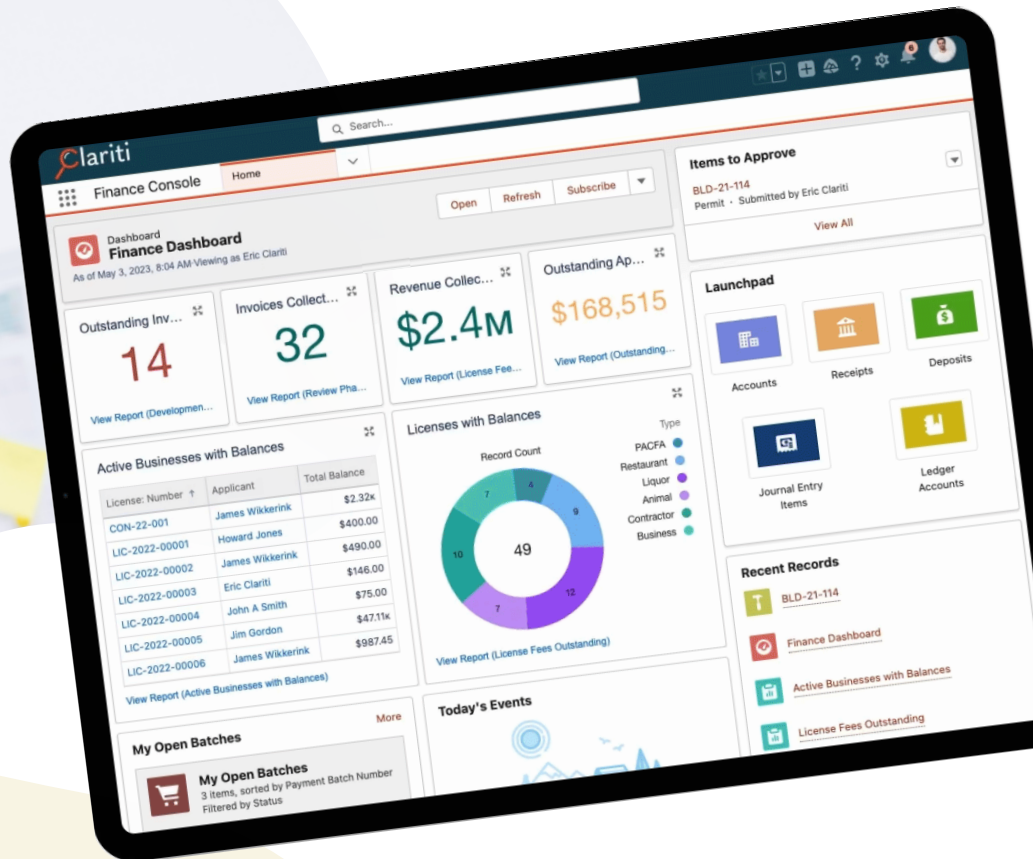
Integrations

Before settling on a new system, ask your chosen permitting software vendor what managed integrations they offer, and what the process would be to integrate with your existing tools.

Most vendors offer managed integrations that ensure seamless bi-directional data sharing between your permitting system and other solutions like electronic plan review and GIS software. They're partly built and tested so there's minimal configuration required to meet your organization's business needs, and enable you to centralize all of your permitting-related data within one system. No more scouring different systems for information — there's only one source of truth.

Look out for some of these common integrations to extend your permitting solution:

Electronic Plan Review

Electronic plan review integrations enable you to track and complete all plan review steps within your permitting system, from one screen. Leading providers include Avolve, Bluebeam, and ePlanSoft.

Email/Outlook

An email/Outlook integration enables you to centralize all email communication associated with a permit record. Send emails and track all communication history directly from your permitting system interface.

GIS

With Esri® ArcGIS, you can view and analyze real-time GIS data on the same map as your permitting data to inform land use decisions.

Payments

Pre-configured online payment integrations like Clariti Payments make it easy for your customers to pay for permits and other services online via your portal.

Electronic Document Management System (EDMS)

Used to store, share, track and manage files or documents like building plans.

Also, consider your long-term needs, and whether your chosen solution is flexible enough to evolve with you.

If a solution doesn't have an open or public API, making any future changes to your system will either not be possible or very expensive. In essence, an open API allows platforms and systems written in different languages to more easily interact. It also helps programmers understand the ins and outs of a system they're planning to integrate to simplify the process.

Go for a scalable solution to ensure you can add new tools and applications as you need in future.

ROI: how it supports citizens and staff

Purchasing and successfully implementing your new permitting system will yield measurable and tangible results over the long term. But it will also result in intangible positive outcomes that are more difficult to measure (like customer satisfaction and a boost to your organization's reputation).

To help you justify your investment, here are 10 of the many benefits you can expect:

1. 20-80% reduction in permit processing time

On average, permit software reduces processing time by 20-80% with features and functionality that simplify and speed-up everyday processes like a permit guide that helps customers submit their permit application correctly, without help; automation that generates templates, triggers next steps, calculates fees, and fills in known data; visual dashboards that keep teams aligned and on track; and more.

Ultimately, with automation and all of your permitting-related information and communication handled via one platform, you can more easily collaborate to move faster, and in doing so, cut the costs new businesses and developers face with lengthy permit wait times. You might also help spur economic development (and eventually an increase in revenue from property taxes and permit fees) as developers and builders are drawn to areas where they face the least red tape.

Get a quick estimate of your cost savings, reduction in processing time, and potential revenue increase using this ROI calculator.

2. A better customer experience

It's not often you hear exceptional customer experience and government services in the same sentence. But with modern permitting systems, that's starting to shift.

With self-serve online portals, customers can easily access the services and information they need, 24/7/365. Whether they're looking for information, want to apply for a permit or request an inspection, or need to pay fees or check the status of their application - they can do it all online.

3. A better staff experience

Adopting supportive technology that helps with productivity can significantly improve the employee experience and even help you retain and attract talent. Staff have far less repetitive, manual work, and can focus on high-priority tasks like reviewing plans and conducting inspections in the field.

As an Aspen Field Inspector explains in this story about his team's day-to-day life using Clariti, "It just makes everything a million times easier."

4. Process transparency

All-in-one solutions provide your customers and staff with full transparency into the end-to-end permitting process. Customers can get the answers and status updates they need online, reducing calls and counter visits, and staff can see all data associated with a permit record or land parcel from one screen. All activity is tracked and visible in the system.
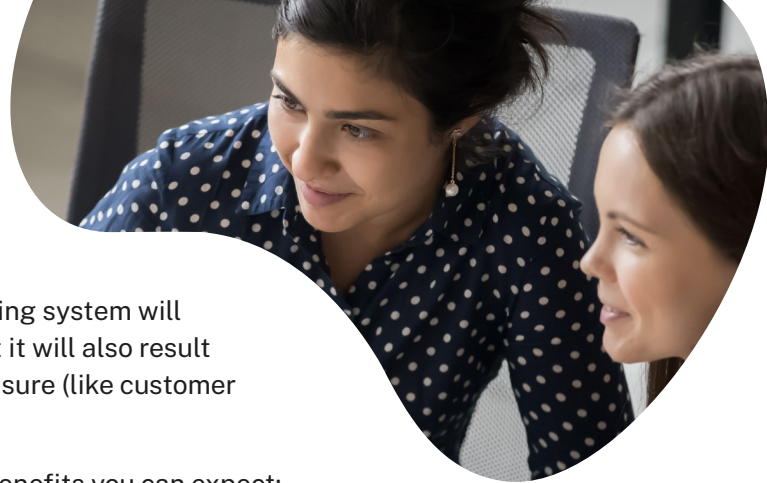
5. Flexibility to meet changing demands

Leading permitting systems are highly configurable so your department can easily add/change/remove workflows and processes to adapt to changes in demand or regulations. With some systems, it only takes a few clicks to drag and drop fields into place to make updates.

To get an idea, watch this webinar to see how Orange County's permit software enabled staff to add a new workflow in a few hours.

6. Better reporting and analytics

Your new solution will enable you to harness all of the data you capture to improve performance and make decisions based on accurate data. Look out for software that offers limitless options for reports and dashboards so you and your team have the freedom to use your data however you want.

You'll also want a system that offers easy configuration (like a drag-and-drop reporting tool) and subscription settings so you can automatically update designated stakeholders in real time. That way you can significantly reduce the time it takes you to pull reports, and can use and analyze more of your data to forecast growth, anticipate revenues, improve performance, and more.

7. Reduced reliance on IT

With cloud-based permitting systems (especially those that are highly configurable), IT have less to support and worry about. Security is the responsibility of the vendor, and administrators and business process analysts are able to set up business rules and permissions. They can also maintain logins, run reports, create merge documents, and make changes to processes as codes and policies change without IT support.

8. Less repetitive admin work

All software solutions offer tools and automation that help your staff do more with less. This can include prebuilt templates for permits and other materials that are triggered and sent automatically, automated inspector assignments, automated response and activity tracking, and more.

9. Mobile inspections

With mobile inspection capabilities, your inspectors and code enforcement officials can take their office with them wherever they go. They can manage all inspection-related tasks from a phone, tablet, or computer, whether they're online or offline.

10. Helpful integrations

As mentioned above, when you buy new permit software, you have the opportunity to improve your business processes even more with complementary integrations and tools like electronic plan review software and permit application guides that set every applicant up for success.

Purchasing and successfully implementing your new permitting system will yield measurable and tangible results over the long term.
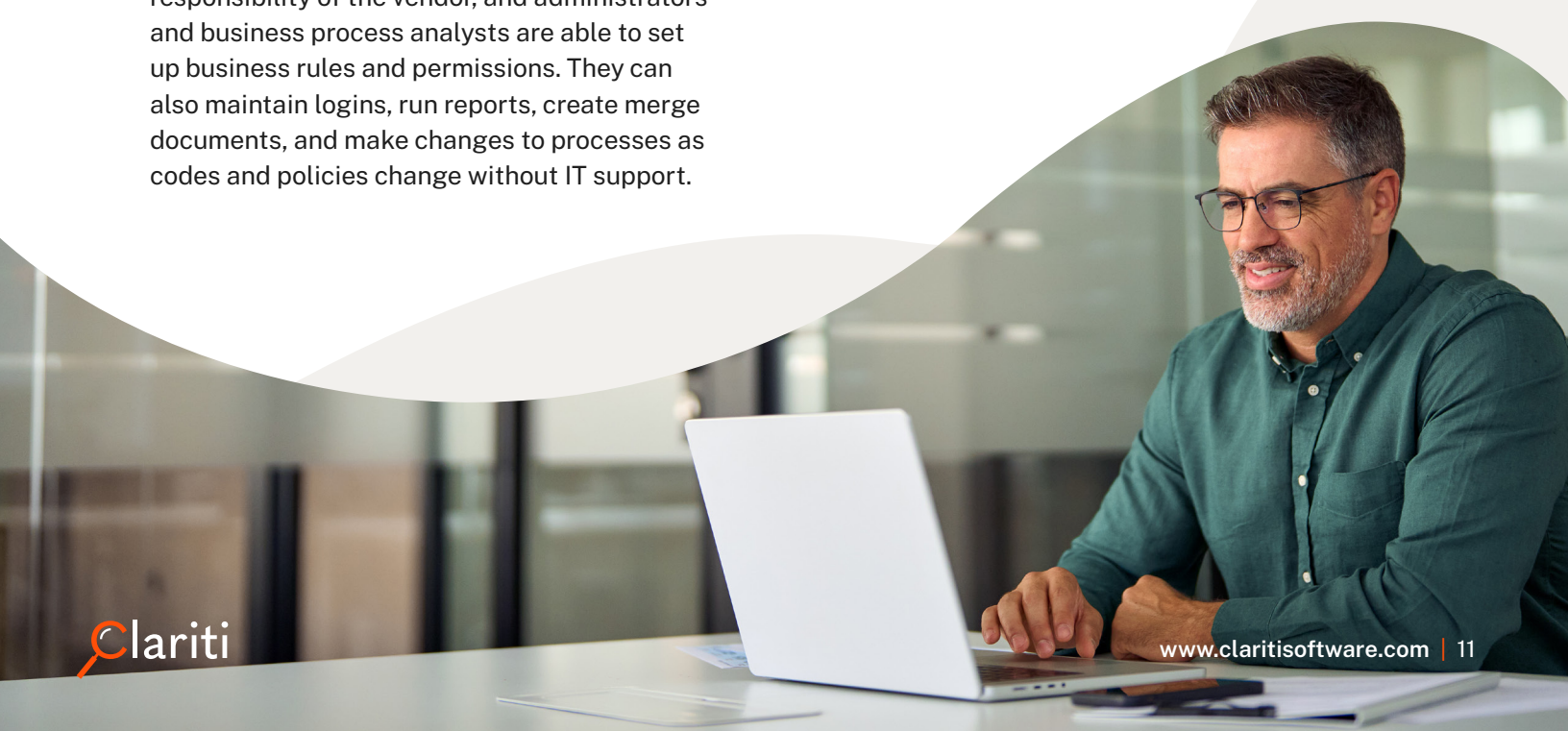
How to get buy-in from stakeholders

Getting buy-in for your project is critical to the success of your software implementation. If your key stakeholders don't feel heard or that their needs are met, they're unlikely to be satisfied with the final product.

To avoid encountering roadblocks, follow these 3 proven steps to get your stakeholders on board:

1. Define and engage your stakeholders

Start by identifying and defining key stakeholders for your project. A good way to do this is to ask one of your professional customers (like a developer that does lots of business with your community) and 3-4 of your permitting staff to sit down and document every person involved in your most common permitting process. They can use a spreadsheet or whiteboard and should be able to come up with a complete list of stakeholders in as little as 30 minutes.

Now use this same group and brainstorm the best ways to engage these stakeholders using different communication methods. In a short period of time, a few knowledgeable, experienced people can create a matrix that can form the foundation of your project communication plan (more on this below).

You'll likely come to this conclusion on your own, but make sure to focus on the people who will use your new system the most, first. Developers, builders, and everyday staff users will benefit the most from your new permitting system and can help to build excitement for your project. They may even jump to volunteer as test drivers of your new system.

You should also engage with IT right away as they'll be an instrumental partner throughout.

Meet for coffee with your IT Director or someone else from the department and explain your business needs and what you're trying to accomplish. Be prepared with a vision that succinctly describes your project goals and ask for a commitment of a monthly check–in so that you can work together to keep your financial and budget resources in sync.

Next, offer to take IT staff out into the field so they can better understand your purpose and mission. Let them ride along with inspectors, meet your customers face to face on a construction site, and job-shadow a permit technician and plans examiner.

Meeting with a similar-sized government organization that has already implemented permitting software can also help show the contrast between your current process and your envisioned future in real life.

The more IT understands about your current process and what you're trying to achieve, the more effective they will be as your partner and advocate during RFP preparations, vendor selection, and contract negotiations. You can learn tips from a former director of planning and development on how to build a stronger relationship with IT in this blog.

Outside of your customers, everyday staff users, and IT, you'll need to engage other people on the periphery later on in the buying process.

Below are some ideas for how to go about getting various stakeholders on board and excited about your project. You can find more detailed advice in this blog.

Customers
Get yourself invited to speak at local meetings and associations to talk about the project and receive feedback. This could include builders associations, professional planners groups, building officials, or professional trade groups. You should do this early on as it can help you shape your new and improved processes to best meet your customers' needs.

Elected Officials
After you understand your customers' needs, start meeting with your elected officials. Make individual appointments with each of the elected officials who will need to grant authorization for spending on the project. Tell your story in no more than 15-20 minutes and then ask if they know of any other groups they suggest you meet with. They can become a proponent of the project even before they're asked to make any decisions.

Other Decision Makers
Consider meeting with attorneys, finance and accounting, and human resources early in the process. Spend the first few minutes building a relationship and the second part making your pitch and asking for their future support and help. Keep a list of these decision-makers and send them frequent updates via email or newsletters during the project.

Leadership
Your supervisors, managers, and team leads should be the biggest supporters of your project. Engage with them early to answer all of their questions and address any of their concerns. Set up regular meetings with a standing agenda item to address any emerging issues.

Employees
Look for internal champions and encourage them to take an active role in implementation. They can help build excitement across the broader team and may be able to help sway other employees that don't want to change.

3. Build a communication plan

It's important to build momentum around your project with frequent and clear communication. You need to ensure everyone understands the scope of the project and how it will positively impact everyone in the end.

To make sure your message about the project is never lost, build a reusable template for presentations that you can share over and over again.

You can keep it simple.

Answer the questions of Who, What, Why, Where, and How, spending the most time explaining why you're devoting resources and time to the project.

1. The purpose of the project
2. The problem you're trying to solve
3. Expected outcomes
4. The scope of the project
5. The draft schedule
6. Your estimated budget
7. The different phases of the project

Ultimately your presentation template will help you and your team focus, eliminate mixed messages, and clearly communicate your vision. It will also prove useful for last-minute council meetings, finance questions, and to get new staff up to speed.

2. Build a business case

Most organizations, especially larger ones, should consider building a business case. It will likely be the most detailed document you produce aside from your RFP and you're likely to refer back to it throughout the life of the project.

A Business Case answers the "why question" in more detail and helps to justify your project based on its expected measurable benefit(s).

In your business case, you should state in plain language:

- ☑ The problem and business need
- ☑ The benefits and risks of each solution you identify
- ☑ Expected return on investment (ROI)
- ☑ Your final recommendation, subject to funding and legislative approval

Also be sure to include:

- ☑ How many permits you issue annually by type
- ☑ Cost of lost files (electronic or paper)
- ☑ The estimated cost of software, hardware, and professional services to implement the software
- ☑ The average cost to handle paper permits, if applicable
- ☑ Cost of storage, microfilm, and archives
- ☑ Current and future performance metrics, current and goal review times, and customer satisfaction measures

Budgeting: putting together a funding proposal

Whether you're competing for access to grant money or pitching to leadership why you need funding for your project, a successful funding proposal is key to maximizing your chances of success.

A well-put-together proposal clearly outlines the purpose of your project and the value it will provide. It also should state your preferred vendor and an explanation of why you think they're the best fit. At this point you won't be making an official buying decision, but it helps to have your preferred vendor in mind when putting together your funding proposal, and later your RFP. So, how do you craft one?

Step 1: Identify the key decision-makers and assemble the necessary team

Include everyone inside and outside of your team who will benefit from the project - the more perspectives and expertise the better.

Step 2: Start putting together your proposal

All proposals differ slightly, but you should follow this basic format and address these questions:

→ Basic details about what your agency or department does

→ A description of your pain points, and if applicable, how they're negatively impacting your community

→ How permit software will solve these challenges

→ Your expected return on investment (ROI)

→ Your proposed budget for the project

→ The expected project timeline and a clear plan of action for purchasing through to implementation

→ Your recommended vendor solution and why, including a detailed cost breakdown

Also, as general proposal best practice:

→ Involve your preferred vendor as you gather budget quotes to ensure you're including all necessary expenditures

→ Include "SMART" goals for your project: Specific, Measurable, Achievable, Results-focused, and Timebound

→ Provide a detailed budget justification. Explain how each individual line item will help you accomplish the goals of your project

→ Get feedback from your vendor or consultant. They generally have experience working on proposals like this and can help you put yours together

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Procurement

After your budget has been approved, it's time to issue your RFP and evaluate potential vendors. If you go through a formal public procurement process, this typically takes six to eighteen months and involves:

→ Gathering requirements (make sure you do a comprehensive needs analysis)

→ Writing the RFP (we cover best practices in the next section)

→ Reviewing proposals (you might receive more than a dozen!)

→ Issuing the RFP and managing procurement

→ Hosting software demonstrations

→ Officially selecting your preferred vendor and requesting a best and final offer (BAFO)

→ Negotiations and entering into a contract

All in all, it's a time-consuming and lengthy process. If you're worried about your team's bandwidth and have the budget for it, you might want to consider partnering with a technology consultant who can take on the bulk of the administrative work. If you're considering this option and don't know where to start, reach out. We can connect you to our network of trusted consultants.

Alternatively, there are several options to reduce the associated costs or skip the public procurement process altogether:

1. **Use a buying group or procurement vehicle.**
   To save you time and money, your state may allow purchasing through a buying group or procurement vehicle like Carahsoft or Insight. They can do a lot of the heavy lifting for you.

2. **Directly purchase your software.**
   Depending on your community's purchasing rules, you may be able to purchase software directly if under $100,000. If you're a smaller organization, you could look at a solution that offers a platform price rather than a user price which is more likely to fall within this budget. Or, if you're a larger organization with more users and complex requirements, you could consider purchasing the software separately from the implementation services to make this work. Then you only have to release an RFP for implementation services.

3. **Opt for an RFQ.**
   If you're ready to move forward with your preferred vendor and don't need to formally evaluate other software, you can write an RFQ (request for quote) for your preferred system. Unlike an RFP, an RFQ only details pricing options. If you're ready to buy your preferred solution, this is one of the final steps before making your purchase.

4. **Host an invite-only RFP.**
   If you've narrowed your search to a few select vendors you want to evaluate, you can host an invite-only RFP to limit the number of proposals you receive.

5. **Take advantage of existing contracts if available.**
   You might have the option of purchasing from a contract held by a neighboring municipality or state-level agency.

A typical procurement process takes six to eighteen months.

Buying: how to procure the best system for your needs

To help vendors provide you with the best solution at the best value, it's important for you to clearly explain your needs and pain points in your RFP.

You likely have a good idea of what to include, but to be sure you cover your biggest needs and challenges, answer these questions before you start writing:

→ What does your community find challenging about your current permitting system/process?

→ What do your staff find challenging about your current permitting system/process?

→ How quickly do you process permits compared to neighboring communities?

→ How often do staff answer phone calls from applicants?

→ How often do applications contain mistakes?

→ What does it take to make changes to your system?

→ What information is your organization and community missing?

Your answers can help you prioritize and clearly define your needs in your RFP, in turn ensuring that vendors can address them in proposals. Just make sure you get input from staff in different departments and across different levels so you don't leave anything out.

Once you have a complete list of your organization's pain points and needs, you (or more likely your procurement team) can start writing.

As a general guideline, your RFP should include:

☑ **Your challenges with your current system and goals for the new system**

☑ **Detailed requirements stating exactly what you need**

- The more specific you get here, the fewer roadblocks you'll encounter later on in your implementation

- Consulting firms can help you develop this list of requirements with less stress and more structure

- Before you release an RFP, it's okay to work with vendors to flesh out exactly what you need

☑ **A page limit to reduce the amount of information you need to review**

- A page limit of 25-50 pages is ideal, excluding requirements and appendices

☑ **Questions that ask for explanations, such as:**

- How does your implementation process work?

- How does your solution address our pain points?

☑ **An overview of your procurement process and how you'll evaluate proposals and demos**

☑ **An opportunity for suppliers to ask questions, and a deadline to provide answers**

☑ **Some real numbers such as:**

- The number of people that will use the system

- How many applications you process in a year

- Your budget

Your RFP will of course be unique to you, but the above can serve as a good starting point.
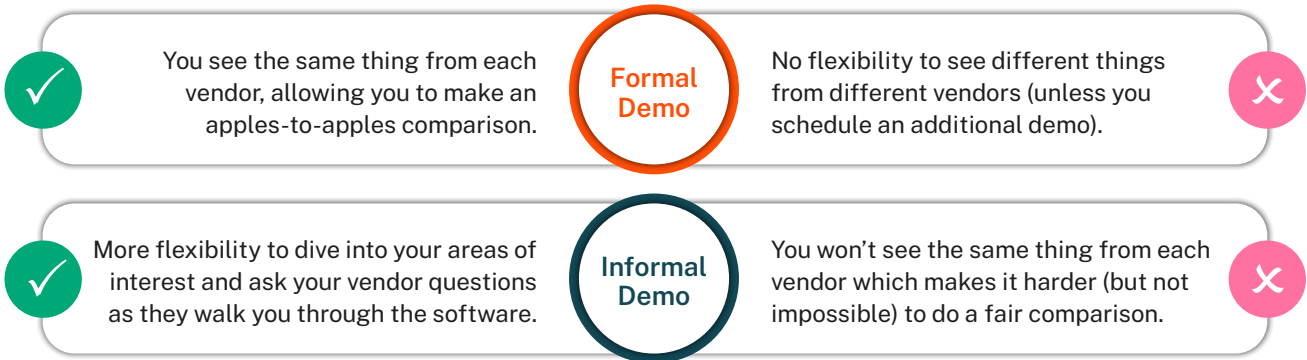
Evaluating proposals and software demos

After you've released your RFP, it's time to evaluate vendor proposals. At this point, you're so close to making that final buying decision!

In addition to reading through written submissions, this is when you'll sit down to watch vendor product demonstrations (if you haven't already). Seeing the software in action gives you an opportunity to ask more questions and explore areas of interest that come up during your proposal review.

You may already have a few final contenders in mind, but if you've received 10+ proposals, consider limiting the number of vendor product demonstrations you watch to three. That way you'll get a good comparison of options without getting overwhelmed.

You also need to decide whether you want to ask vendors to run a formal demo, where you provide a strict script and timeline, or an informal demo, where you share topics you're interested in and let vendors set the script.

| ✓ You see the same thing from each vendor, allowing you to make an apples-to-apples comparison. | **Formal Demo** | No flexibility to see different things from different vendors (unless you schedule an additional demo). ✗ |
| ✓ More flexibility to dive into your areas of interest and ask your vendor questions as they walk you through the software. | **Informal Demo** | You won't see the same thing from each vendor which makes it harder (but not impossible) to do a fair comparison. ✗ |

If you do move forward with a formal demo, remember to leave time to explore the solution(s) you like in full! Sometimes a solution will have an item not on your radar that blows you away (or you don't like).

Also, make sure to ask lots of questions during demos, especially related to making changes. Software that enables you to easily make changes to your portal, processes, and workflows will serve you best long term as regulations and needs inevitably change.

Ask these questions during a demo to help you assess whether a vendor's software is as configurable as they say:

- Could you show us how to change X, Y, Z workflow?
- Could you show us how to create a new report?
- Could you add a new field to a sample permit on this call?

If the presenter can't do it live during the demo, the solution's probably not as configurable as they say.

Clariti

Preparing for organizational change

It's important you have a change management plan to help ease the transition to your new software.

A well-thought-out change management plan can go a long way in ensuring staff embrace your new technology and that you encounter fewer roadblocks along the way.

Here are 5 tips to help you navigate organizational change:

1. Build your best team

The most effective way to lead organizational change is to create a cross-functional, multi-disciplinary, high-performing team. It's one of the most important project decisions you'll make.

Here's how to go about building one:

First — know that you'll have to take some of your high performers off the front line to work on this project (at least for a short time). This project will become their priority and they'll have less time to devote to their everyday work. Make sure you have the budget and the hiring ability to temporarily backfill their old position.

Your best team will include informal leaders, the problem solvers, and the "go-to" people from every department that this project will impact in some way. You'll also need to designate a project manager who will be responsible for implementing the rollout plan, keeping the momentum going, and dodging roadblocks along the way.

Exactly who should be on your team depends on your department, but to give you an idea,

if you're a building and planning department, your core team might consist of an experienced permit technician who understands all of your existing processes, a plans examiner, a building inspector, and a land use planner. You should also get someone from IT and request that a business process analyst and programmer be assigned to support your team. You could also consider adding an engineer (traffic, civil, drainage), a biologist, fire reviewer/inspector, code enforcement official, and records specialist further along in the project to represent those disciplines.

Ideally, you should have a representative from every team directly or indirectly impacted by your new system.

Then, once you've formed your team, you should create a Team Charter to establish expectations for team structure, accountability, and what to do if and when conflicts arise. You should also create a Steering Committee that the team reports to and can go to when they need answers.

It's important you have a change management plan to help ease the transition to your new software.

2. Prepare a risk management matrix

With change, comes risk. Think about what's happening in your organization right now. What are some of the existing risks that could disrupt your rollout? Or risks you might encounter as you get close to launch?

You might face the risks of staff attrition, poor internal adoption, public or media backlash, or even natural disasters. Try and think of all risks, no matter how minor or unlikely they are.

If you're stuck, a good way to learn more about the risks specific to your region is to connect with other local government units nearby that have adopted online government software.

Then, have your team map all of them out in a risk management matrix. Anything that could delay the software launch, impact adoption, or inflate costs should be documented.

A risk management matrix is a visual way for you to identify and capture the likelihood of project risks and evaluate the potential damage or interruption each could cause. It should also include a list of actions to mitigate each risk.

3. Communication early and often

Make sure you communicate clearly and often about your project's progress. One of the first things you should do is share the why and the how of the new solution. How will it benefit staff? Why are you making the change? Sharing this early can reduce the likelihood that your staff will resist the change.

Celebrate achievements even if they're small to keep team morale high, and keep everyone in the loop about any hiccups you encounter along the way.

And don't forget — communication goes two ways. Encourage questions and courageous communication from your team.

4. Be ready to adapt

Some things will inevitably change over the course of your project, so make sure to set up regular meetings with your team to assess whether any updates to the software interface or application process are warranted.

5. Stay engaged with your software vendor

They've helped organizations just like yours successfully navigate change.

Implementation and training: ensuring success

Preparing for your implementation involves a number of moving parts and begins before you release your RFP.

Here are 10 best practice tips to help you prepare:

1. **Engage leadership early and establish clear expectations with staff from the start**
   - Prepare and conduct internal change readiness assessments before kicking off your project.
   - Set realistic targets to measure success.
   - Establish key leadership roles and relationships across departments.

2. **Develop a comprehensive communications strategy**
   - Plan for frequent communication and updates for your executive team, project staff, and constituents.
   - Include talking points for leadership.
   - Clearly outline what the system will and won't do.
   - Make sure your goals resonate with senior leadership to keep the team aligned with your message.
   - Tailor communications to the needs of each functional area and phase of the project.

3. **Create a realistic, effective project plan**
   - Follow the iron triangle of project management: put good processes in place to manage cost, time, and scope.
   - Plan to have a full-time project manager.
   - Establish a steering committee to oversee the project.
   - Ensure that your team (including IT) is adequately staffed to meet deadlines.
   - Develop a project management structure to coordinate with the IT implementation team.
   - Consider writing new job descriptions to account for how business processes, roles, and interactions will change.
   - Include a contingency budget in the range of 10-20%. It's common for changes to come up over the life of the project.

4. **Set goals upfront to create alignment and clearly articulate what's important**
   - Find out what metrics you can report on now, and what metrics you want to be able to measure with the new system.
   - Establish target metrics and goals you'll use to measure project progress. These may include:
     - Reducing application processing time from x to z.
     - Increasing revenue by x.

5. **Track project data so you'll be prepared to share reports and insights externally**
   - Develop meaningful key performance indicators (KPIs) to assess current performance.
   - Measure data against KPIs upfront to establish a baseline.
   - Track current costs (software, professional services, change orders, annual maintenance, internal transfer costs) to support your current system.

6. **Go into the project with realistic expectations**
   - It's more than likely the requirements you come up with for your RFP won't account for everything you want and need. Expect what you outlined in your RFP to get you 80-90% of the way there.
   - The missing 10-20% of required functionality you left out will come when you reach the User Acceptance Testing (UAT) phase, which is another reason system configurability is so important. You can react quickly to any last-minute changes.

7. Establish a training delivery model early

The three common training delivery models are:

- **Train the Trainer (TTT)**

  In this model, you identify key individuals across relevant functional areas to be trained by the project team. These trained team members are then tasked with teaching others.

- **End-User Training (EUT)**

  Your vendor is responsible for training your entire workforce. Training is structured and rolled out in a planned number of sessions. This model may come with additional vendor costs.

- **Computer-Based Training (CBT)**

  Online training is self-paced, enabling end-users to complete interactive lessons and tests. Usually, this type of training is most useful when coupled with another training delivery model due to the complexity of these projects.

8. Take inventory of your letters and reports before the RFP phase

- Review which letters and reports you need.
- Identify your gaps. What reporting do you need that isn't currently available?
- Confirm if any letters and reports are done outside the current system.
- Document as much information as possible regarding the number/type of reports required; the number/type of letter templates by functional area; and the number of license prints required.

9. Track project data so you'll be prepared to share reports and insights externally

- Plan to review, evaluate, and cleanse your data before project kickoff.
- Be transparent with your vendor about the status and health of your existing data.

Here are 8 tips to prepare your data for a successful migration:

- ☑ Dig into statistical information to make sure you understand what type of data is being converted.
- ☑ Address any data accuracy issues before your project. Make sure data fields are used for their intended purpose.
- ☑ Set your expectations of data hygiene up front so you know the extent of cleansing you'll need to perform.
- ☑ Figure out if your legacy data can be consumed by conversion tools, and whether or not IT staff can access, manipulate, and cleanse it.
- ☑ Analyze your historical data and clear any data retention rules.
- ☑ Communicate the size of your legacy database so your vendor can plan data loading accordingly.
- ☑ Document any areas of data complexity such as data with parent/child relationships that will require correct sequencing.
- ☑ Identify the number of data sources to migrate (including any Excel or MS Access Tables).

For more information and tips, download this data migration guide.

10. Lean on your external partners for support

Your vendor and system implementation partner (if you have one) have years of experience implementing permitting software. Take advantage of their expertise whenever possible.

Ultimately, there's no such thing as an implementation going exactly to plan, but if you invest the time upfront to prepare, you can limit the number of roadblocks you encounter along the way.

For more details about preparing for your implementation download this guide.

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