



Note to reader: In my role as freelance writer/editor for the enterprise technology consultancy The Phelon Group (from 2002 – 2007), I was often brought into client engagements with leading technology firms as a “Phelon Group consultant.” For this particular project, I edited and rewrote several success stories, and developed a success story methodology, to guide the client writing team in its efforts. The sanitized story below represents the comprehensive story rewrite I sent to the client.

Note: Yellow-highlighted areas either need to be filled in, or are areas where it would be nice if we could make text more specific.

**State of Montana
Office of Public Instruction**

*State agency reduces federal grant administration costs by XX dollars annually;
redirects savings to educational programs with Kramerica Solutions*

(As mentioned during our call, it would be great if you could estimate the savings attributed to the Kramerica-based processes and then provide some examples of how customer is using those reallocated funds. We can always extrapolate the figures based on average costs to produce, distribute, and process the 800+ applications received on paper during previous grant cycles.)

Commented [reg1]: If this story does not include information about how the fund were redirected, I would suggest another headline. Based on the story I developed below, perhaps something like: State agency dramatically improves education-based customer services; reduces administrative costs by \$xxx each year with Kramerica Solutions.

Page 1 Sidebar

State of Montana, Office of Public Instruction

- State agency overseeing education in Montana’s K-12 public schools
- Size: *how many employees?*
- Founded: *when?*
- Web site: *where?*

Project Champion: **Cosmo Kramer, General Manager**

Industry

Government

Products Used

Kramerica Product 1
Kramerica Product 2
Kramerica Product 3

Overview/Executive Summary

Parents, teachers and others working within Montana’s educational system rely on OPI, the State’s Office of Public Instruction, which serves 800-plus school districts providing K-12 services. **A few years ago**, OPI



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administrators began feeling the crunch of more demand and less budget; their organization was serving **more students year after year**, all while receiving less funding. To bridge the widening gap between resources and demand, OPI management looked for ways to more efficiently disseminate information and process grant applications while cutting costs. Kramerica Solutions proved up to the challenge; OPI estimates its new automated workflow processes and electronic information delivery systems are directly responsible for more than **\$xxx** in savings during the last **x** years.

A familiar challenge to state agency administrators: Do more with less!

If you're in leadership at any state agency in the U.S., you're likely familiar with OPI's challenge: Meet higher demand and improve services despite shrinking budgets. "With fewer funds available, we thought one of the best ways to achieve our goals would be to streamline operations by eliminating manual processes whenever possible," says **Cosmo Kramer, OPI's managing director**. Two resource- and administrative-intensive tasks fell under Kramer's scrutiny: Public information delivery came first, and then grant application processing.

Coin toss: Information fulfillment or administrative duties?

Because the materials parents and educators most frequently needed from OPI were not available online, OPI's small staff felt constant pressure to stay on top of regular duties while replying to a never-ending stream of requests for paper-based information. School employees and would-be employees called, e-mailed, and wrote every day asking for updated teacher certification requirements, **this thing and that thing**. Parents sending their children to school in Montana did the same, asking for school district analyses, student achievement reports, and **xxx**. OPI's administrative offices typically **spent x** hours a week or more acting as an information fulfillment center; Kramer estimates that his staff **received xxx requests** for paper-based information each week.

He faced a dilemma: Either pull staff from regular work to promptly get information to the people who needed it, or handle the daily administrative work first and then fulfill information requests as time allowed. Until Kramer discovered Kramerica, he saw no other options. "The cumulative costs of these activities were high, and the service was slow," Kramer recalls. "With only **a few** employees to handle information requests, it often took us weeks to respond."

Kramer selected Product 1 software to speed the information delivery process and end the coin toss. He and his team converted 4,000+ documents from a variety of native applications, such as x, y and z, to platform- and application-independent Kramerica files. The team then posted those documents online for public and educator access. "Kramerica Product 1 and Kramerica Product 2 bridged the gap between the computing applications we use and the applications used by the public," says Kramer. "With Product1, the materials we create are readily available to anyone with the free Kramerica Product2 software."

Expect turbulence: With 800 districts, and 2,000 information fields per district—OPI was processing 1.6 million pieces of information—manually!

Kramer, having met one challenge, soon began exploring how else OPI might increase efficiency and make lives easier for its staff and constituents. One process in particular stood out in his mind: The grant application process.



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Seeking federal funds each year, administrators throughout Montana’s 800-plus districts had to download and print a 40-page grant application form from OPI’s website. District staff typically spent weeks filling out the form’s 2,000-plus fields and routing the application back and forth among administrators. “Because so much detail is required on the application, it is not uncommon for administrators to forget to complete fields on printed forms,” says Kramer. “This further delayed form processing.” After weeks of preparation, district staff finally mailed their completed applications to OPI—where yet another time-consuming and error-prone process began.

When a grant application arrived at OPI, a staff member keyed the data into a Microsoft SQL server database. And because a submission often contained dozens of pages of supporting detail in addition to the application itself, manual data entry, for just one application, often took a single staff member one to two days to complete. As is true for all manual processes, this added layer of data entry increased the likelihood of data entry errors—errors that could potentially hurt a district’s chance of receiving funding in a timely manner, or depending upon the severity of the error, even at all. Staff faced with incomplete or inaccurate applications mailed the documents back to district administrators...and the whole process would begin again.

Commented [reg2]: Not sure about this...

Commented [reg3]: Not sure about this, either. If this is not true, you can delete the entire portion without hurting the structure of the paragraph.

[A PORTION OF THE STORY HAS BEEN CUT FOR LENGTH HERE]

A Look Inside the Agency Today:

Fast Service, Easy Processes—and Cost Savings Beside

No more heads or tails: Now, everyone wins

Today, those interested in Montana-based education may, at their convenience, search for, read, and print items of interest stored in online OPI repositories “Because education information is easily available online, we’ve been able to reduce information distribution costs by **XX** dollars annually, freeing staff and resources to focus on higher-value customer service activities,” says Kramer. *(Steve— any estimates on cost savings or examples of new services the district has been able to offer because of the reallocation of resources?)*

Grant Applications Processed in Hours, Not Weeks

OPI’s once-tedious, paper-based grant application process is also easier for all parties involved. Today, school administrators complete applications electronically with the free Kramerica Product2 software. They can save in-progress applications on their computers, and add electronic comments before e-mailing applications to coworkers for easy intra-district collaboration.

Fields on the electronic application expand automatically to accommodate extra information, so administrators no longer submit dozens of supporting documents. To make things even easier, Kramerica Product 1 application’s built-in validation feature verifies that administrators enter the right data into the right fields, and alerts them if fields are missing information—another bonus for OPI and its management. Kramer says that error rates on applications have decreased by as much as **XX percent** since the new system went live. *(Steve— any estimate as to the decrease in errors on forms).*

Administrators e-mail completed applications to OPI, where an in-house developed system extracts information that OPI’s staff uses to determine grant eligibility. And should an application be missing information, OPI’s staff simply adds electronic comments to the Kramerica Product 1 form and e-mails the application back to the district administrator.

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“The online forms processes supported by Kramerica Solutions have been a great success,” says Kramer. “Application processes that previously could take weeks can now be handled in hours.” A great success indeed—more than 98% of Montana’s school district administrators opted to complete and return their applications electronically the very first year intelligent Kramerica Product 1 forms were available online. “That speaks volumes about the demand for and benefits of the automated processes,” Kramer says. His requirement for rapid adoption has been met as well. “Cost is always a factor that can hinder adoption of automated processes,” says Kramer. “But since everything is done using the free Kramerica Product2 software, we’re not placing any financial burden on districts.”

Is Kramer pleased with the outcome? Cost-savings besides, he says the benefits of Kramerica Solution’s technologies are being realized at every touch point: Mr. and Mrs. John Q. Public now quickly and easily access the information they want and need online; district administrators now spend less time completing grant applications; and as a result, OCI’s staff may now focus on meeting their mandate—to do more with less.