



Ensuring  
**73% Faster**  
**Funds Disbursal**  
with an **Automated**  
**Solution**

Established in 1965, our customer is the largest metropolitan planning organization, overseeing 6 counties, 191 cities, and serving a population exceeding 18 million residents. Responsible for orchestrating diverse programs, the organization collaborates closely with state, regional, and local governments to advance Southern California's prosperity. As the principal authority for granting funding to pivotal initiatives, the metropolitan planning organization manages an extensive array of grant applications, proposals, and invoices from its headquarters in Los Angeles. The timely acknowledgment, processing, and approval of such financial documents are paramount to the organization's mission of *"Catalyzing a Bright Future for Southern California."*

## Overcoming Manual Validation Bottlenecks to Expediate Approvals

Inefficiencies stemming from manual validation processes hindered the timely processing and approval of financial documents within the organization's grants program. Despite the program's significant expansion in recent years, reliance on manual methods resulted in missing documents, processing delays, errors, and resource constraints for the grants processing team. The organization grappled with managing five distinct types of financial documents, including Memorandum of Understanding (MOU) documents and templates, grant agreement drafts and amendments, grant proposal, grant authorization forms, and grant applications from various departments.

Timely processing and approval of funds is mission-critical for the organization. Consequently, the organization's management was determined to eradicate these bottlenecks and ensure compliance with internal protocols by leveraging an automated solution. Hence, the organization sought a technology solutions provider with extensive experience in Microsoft technologies to expedite the document processing timeline and enhance operational efficiency.

Our manual validation process was very time-consuming with various internal review and approval processes across departments. We sought the need of an experienced technology partner to streamline our business operations.

- Manager - Application Development & Support,  
Metropolitan Planning Organization



# Orchestrating an Automated Workflow Solution for a Streamlined Approval Process

---

As a Global Systems Integrator and Microsoft Solutions partner, AgreeYa has a rich history of driving digital transformation and enhancing productivity for public sector organizations worldwide. Leveraging our extensive experience and understanding of the metropolitan planning organization's operations, we embarked on a journey to automate manual validation and approval processes across departments.

Upon engagement, our experts meticulously assessed the organization's existing financial document processing workflow and engaged in discussions with key stakeholders to understand exact requirements. Drawing upon our inferences, we proposed a tailored solution leveraging the Microsoft 365 stack to optimize document processing workflows.

## Key Highlights of AgreeYa's Solution

**Designing for Seamless User Experience:** Our UI/UX experts crafted multiple mock-ups of the approval workflow solution architecture, ensuring intuitive design elements that resonated with stakeholders.

**Development of Automation Solution:** Utilizing Microsoft 365 tools, including SharePoint, Teams, and Power Automate, we set up robust workflows tailored to the organization's specific needs. Our experts adhered to industry best practices to ensure secure configuration and seamless integration.

**Data Insights for Decision-makers:** Integration of Power BI provided decision-makers with real-time insights into the financial document approval process, empowering them to make informed decisions.

**Iterative Development:** Embracing an iterative approach, we gathered feedback from stakeholders to refine and prioritize solution features, leveraging Azure DevOps for efficient project management.

**Rigorous Testing and Comprehensive Training:** Prior to deployment, our team conducted rigorous testing to ensure a bug-free solution. We also provided comprehensive training to empower end-users and support personnel with the necessary skills and confidence.

**Post-Go-Live Support:** Our commitment extended beyond implementation, with post-go-live support provided to address any issues promptly and refine the solution further.

# Transforming Financial Document Approval Processes with an Automated Solution

Our manual validation process is very time-consuming with various internal review and approval processes across departments. We sought the need of an experienced technology partner to streamline our business operations.

- Manager - Application Development & Support, Metropolitan Planning Organization

With the implementation of the automated approval workflow solution, the metropolitan planning organization experienced a significant shift in its operational efficiency and collaboration dynamics. Upon its launch, the solution was warmly embraced by users, particularly the staff in the financial documents processing department, who found it to be a catalyst for their productivity. The management, too, was excited about the streamlined and accelerated approval process, which was previously cumbersome and time-consuming. Parties submitting financial documents now receive prompt acknowledgements and faster approvals for their fund's requests. The benefits realized by the organization were substantial:

**73% Reduction in Processing Time:** Streamlined approval workflows resulted in a 73% reduction in the time required to process financial documents, enabling faster decision-making and fund disbursement.

**98% Reduction in Errors:** Manual errors were reduced by 98%, leading to improved accuracy in document processing and minimizing the risk of discrepancies.

**2X Quicker Identification of Missing Documents:** The automated solution facilitated quicker identification of missing documents, ensuring that all necessary paperwork was promptly acknowledged and processed.

**5-Star Usability and Performance Rating:** Users lauded the solution with a 5-star rating, recognizing its intuitive interface and seamless performance.

**Enhanced Compliance:** Standardized workflows and automated validations enhanced compliance with internal protocols and regulatory requirements, mitigating risks associated with non-compliance.

**Improved Collaboration:** The solution fostered improved collaboration and communication among departments, facilitating smoother coordination and information exchange.

**Automated Reporting:** Management gained real-time insights into process progress through automated reports, enabling informed decision-making and proactive management.

**Real-Time Monitoring:** The dashboard provided a live overview of all workflows, displaying the current status of each financial document being processed.

**Empowered Staff:** Employees were empowered with the necessary skills and confidence to utilize the automated solution effectively, boosting morale and job satisfaction.

# Technology Stack



# About AgreeYa

AgreeYa Solutions is a leading global provider of software, solutions and services to small, medium and global Fortune 100 organizations. Founded in 1999 and headquartered in Folsom, Calif., AgreeYa has over 2,500 professionals helping clients across U.S, India, Mexico, and Singapore. Leveraging a technology-enabled, consultative approach and diverse talent, AgreeYa offers modern workplace, smart analytics, intelligent automation, AI/ML, cloud transformation, mobility and talent management solutions to deliver digital transformation to its clients. AgreeYa has received considerable recognition including certifications like Microsoft Solutions Partner and Cloud Solutions Provider, AICPA SOC 2 Type 2, SEI CMMI and ISO 9001:2015; and awards including 'Dream Company to Work For' and 'Best Employer Brand'.



## Global Headquarters

605 Coolidge Dr., Folsom, CA 95630 USA

**Phone :** +1 916 294 0075, Toll Free: +1 800 AGREEYA, Fax : +1 866 886 1555

**Email :** [sales\\_americas@agreeya.com](mailto:sales_americas@agreeya.com) **Web :** [www.agreeya.com](http://www.agreeya.com)

USA | India | EMEA | Mexico

© Copyright AgreeYa Solutions, Inc.