

## Town of Cary, North Carolina

### Imagining and designing a city of the future with Box



#### PROBLEM

For a thriving municipality like Cary, North Carolina, it's tempting to stay in the comfortable status quo. But a digitally savvy population of 170,000 means citizens demand more and better digital experiences. So Cary decided to be proactive in its approach to citizen services and the civil servant processes happening behind the scenes.

#### SOLUTION

Cary's Research & Development Division brought in Box, using Box Consulting to guide the process and Box Shield for enhanced security. With a seamless Salesforce integration, this tech stack enabled centralized content, control over permissions, and content metadata. And Cary built a bespoke platform that now connects projects and services across its 1,200 employees and dozens of departments and functional work groups.

#### OUTCOME

Achieving the highest industry customer satisfaction index, Cary is instituting a strong cultural shift with tools that work well for everyone, so civil servants can deliver the incredible experiences citizens expect. With frictionless security that protects sensitive citizen information, processes across departments have been transformed.

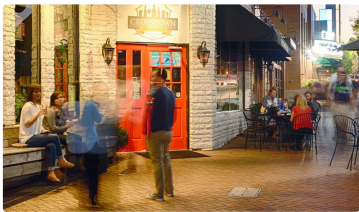
For the people who make a local government run smoothly, the day-to-day job is pretty hands-on. When you picture the folks filling potholes or working on downed utility lines, you might not draw a quick parallel to technology. Yet, these are exactly the people whose jobs stand to benefit most from quick access to the right information, be it maps of utility lines or up-to-date details about town services.

Dan Ault, Assistant Town Manager and Chief Innovation Officer of Cary, knows this. His job is both to oversee the day-to-day operations and to help design the Cary of the future. He sees the role of digital as pivotal to making things run smoothly. "In this information age," he says, "modernizing technology means our employees can have the right information at the right time to better serve the public."

Located near North Carolina's Research Triangle region and three major research universities, Cary is "an interesting place," according to Ault. "We have a very highly educated citizenry that's very tech-centric." There's a distinct pressure put on local government to meet the digital expectations of citizens, and that's partly why Ault, with his digital vision, was hired, and why he quickly created an R&D team to help create Cary's future with intention. He works closely with Carolyn Roman, Services Design Coordinator, and Danielle Mahoney, Performance and Innovation Architect, to drive transformational change.

"We need to be a full partner in this technology revolution, in the changing of the guard to the information age."

Dan Ault, Assistant Town Manager and Chief Innovation Officer, Cary, NC



#### Harnessing the brain power of an experienced workforce

Cary is a thriving place. But Ault is wary of resting on those laurels. "What got you there is likely no longer sustainable," he says. "You need to adapt." A big part of that is transitioning to digital tools and the integrated processes they enable. But that transition can be held back by an in-place workforce that's not digital-native. Still, as Ault explains, "You can't just lay everyone off and start all over. The people who work for a municipality have wisdom and experience."

It's a conundrum. Most people have formed work habits over a lifetime. They won't change overnight, so for change management to work, you have to honor their existing ways of being. With Box, workers across departments can still use the tools they're familiar and comfortable with, but all content is stored in a secure central place, which creates more agility in designing new processes, too.

At this point, Cary has reached 100% Box adoption and has over 1,000 users on the platform. Mahoney says that "the agility and resilience the tool provides has been what's driven success across our organization."

"You need a tool like Box that's agnostic across technology platforms, because citizens are going to use different platforms. What it enables and helps democratize is essential."

Dan Ault, Assistant Town Manager and Chief Innovation Officer, Cary, NC

#### Taking advantage of opportunities to create change

Experienced government workers who have entrenched institutional wisdom can lean into digital tools to design new processes and change things they've been frustrated about in the past. Workflow tools that enable people to work with data in a hands-on way involve them directly in the process of transforming work processes. At the same time, Ault says, for "a new person just starting out, forcing them to rethink processes helps them learn very quickly and move data in a way they've never thought about before."

Simply putting Box in place surfaced plenty of opportunities to redesign processes within Cary Town Hall. But to unlock the full potential of Cloud Content Management, Ault enlisted Box Transform, an accelerated Box Consulting package that brings Box experts into the organization over the course of three years. With this concentrated on-the-ground support, he had the expertise to reimagine the way employees got work done.

The consulting engagement also took the pressure of internal IT to steer change management over the course of the implementation. As Roman says, "We wanted to be mindful of how we introduced it to staff, introducing it in a way that no one would die if something went wrong. As soon as people had access to it and saw how you could do different workflows, and how it integrated well with current processes or made them easier, it caught on like wildfire."

"Box is a great example of how we can drive change from a technology perspective."

Danielle Mahoney, Performance and Innovation Architect, Cary, NC



#### Easier access to unstructured project content

One of the workflows Ault's team designed that integrates with Box was The Catalog, a platform that leans into the integration between Box Platform and Salesforce to house every project within its domains. At any one time, employees have a collective 2,000 or so projects and services going on. To manage all the content and processes that go into all this activity, the government already relies upon Salesforce as a decision-making and project management tool.

Cary employees frequently handle all manner of documents: staff reports, RFPs, bids, contracts, architectural drawings, maps. "On any given day," says Mahoney, "anyone involved with a project can go into The Catalog, access unstructured content, and get a 360-degree view of what's going on." The ability to store unstructured content in Box — then easily retrieve it with a search — has transformed project-based content processes. The partnership between Box and Salesforce, which enables sophisticated project management, has helped increase the technology fluency of the workforce quickly. And with content stored in Box, and the ability to tie metadata to content, Cary is also now set up to take advantage of machine learning as it evolves.

#### Stronger processes, stronger security

Access to information and agility in processes are both important. Having a centralized content platform that integrates with other digital tools such as Salesforce is excellent. But for municipal governments, the number-one priority is always protecting citizens, and that includes their data.

As Ault says, "Security needs to be a top priority, and Box has a better approach than the others I've seen. But it's everyone's responsibility." For this reason, content security is not just about locking down files or requiring passwords. It's also about giving IT ways to quickly spot unusual activity. "The reason we love Box Shield," says Ault, "is because it enables granular capability that cuts across Box and surfaces anomalies. It also helps me prove and demonstrate to employees that we are compliant. The fact that Box is level-4 DOD FEDRAMP certified allows us to stand on those shoulders."

With compliance and security taken for granted, Ault's team can build out new processes on a foundation of accountability. Roman explains, "It's allowing us to rethink our review process and how we handle employee-related matters with processes that have been broken and outdated." Within the HR organization, for example, Box as an integrated content platform has allowed the town to redesign the way certain data-sensitive processes unfold.

"We have to give people authenticated access they can trust. That's a key piece that Box helps us with."

Dan Ault, Assistant Town Manager and Chief Innovation Officer, Cary, NC



#### Imagining and designing the city of the future

As for the future, Ault keeps one eye on it at all times, working closely with his R&D team to imagine ideal new business models for local government. He describes the R&D team as "a special forces unit" that strategically addresses both the challenges and the opportunities the information age brings.

Ault says, "The purpose of having this team is to think about the longer-term view and to understand deeply how we can apply tools we wouldn't be figuring out if we were just fighting fires." The R&D team is focused, but not isolated. Instead, Ault says, "We bring concerned citizens — the squeaky wheels — into the lab to help us." The team regularly meets with citizen advocates to hear about issues that are important to them.

"In the age we're in, [managing a municipality] is only going to become more tumultuous. If you don't have a group devoted to the future, their time will go into other things that keep the lights on, but don't go into sustainable long-term effects."

Dan Ault, Assistant Town Manager and Chief Innovation Officer, Cary, NC

By intentionally setting aside resources focused on the future, but also putting in place the mechanisms for change right now, Cary has established an effective two-pronged approach to transforming how work gets done.