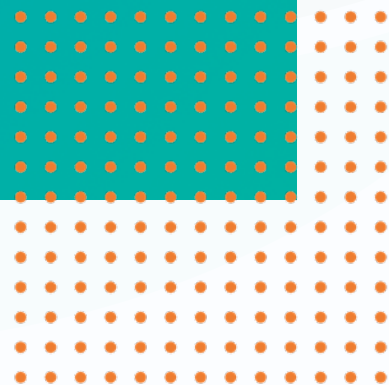# Transforming Montana's Grants & Loans Management Framework

SERVOS

01
Overview

Servos with the State of Montana's Department of Commerce

The Montana Department of Commerce plays a crucial role in promoting and maintaining economic growth in the state. This includes overseeing the grants and loans process that affects Montana's entrepreneurs, communities, and counties.

When we learned that the Montana Department of Commerce team was struggling to manage their grants and loans process using multiple systems, we saw an opportunity to help. We transformed Montana's grant and loan management process into a more efficient and transparent workflow, utilizing our expertise in ServiceNow.

This project supports the governor's 100% digital initiative and established a secure form application intake system within a two-month timespan.

02
Challenges

Dispersed Processes and Significant Inconsistencies Across Agencies

Previously, the MT DoC team relied on multiple systems for their grants management processes—including applications, reviews, and approvals—that spanned different stages of the grants lifecycle. This resulted in a significant number of variations in processes and procedures across different agencies and caused costly inconsistencies.

Difficult to Streamline

Having to switch between systems for different tasks made managing grants and loans complicated and inefficient.

Wasteful Licensing

The use of multiple systems also raised licensing concerns, as ServiceNow was already licensed but underutilized.

Decreased Efficiency

Performance suffered as requests for review or resolution had to be sent to the internal IT team, since the systems were not easily self-manageable.

03 Process

Research and Findings

We worked with Montana's Department of Commerce to examine their current review structure and understand the reviewers' daily technical challenges. We discovered that the DoC team was managing four separate systems to accomplish different workflows. These consisted of Submittable, WebGrants, Salesforce, and a custom-built grants management system.

We studied what was working, what wasn't, and which parts of the process were being managed manually instead of automated. In most instances, we found that ServiceNow's CSM offered greater flexibility and allowed us to link and streamline solutions that would provide significant time and cost savings. Ultimately, we were able to provide more flexibility than these other systems.

04 Result

Establishing a Unified Grants and Loans Application Review System

We met a critical timeline in Phase 1 that enabled the DoC team to build and customize grant and loan application forms. This was huge, as it improved the user experience for both the staff and the public. Reviewers became more productive in managing applications, and the newly improved forms included search functionality and filters that allowed applicants to locate funding opportunities most relevant to them.

Overall, our work in phase one laid the foundation for grants and loans to be tracked more systematically and helped improve the efficiency of the framework in production.

### A Quick Turn-Around With a Smooth Hand-off

This phase was completed within a 2-month duration to help meet the governor's 100% digital initiative. To ensure a smooth transition, we set up a 'Train the Trainer' program after launch. A 'Super User' was trained through internal workshops, who then trained the rest of the team. The workshops focused on ServiceNow's Catalog Builder, which was the main subject of training.

Cost Savings

Before opting in to ServiceNow's CSM, the DoC team had to rely on their IT department to create new applications or review workflows, which led to delays and increased costs.

The new unified system we built streamlined their separate processes and gave them the flexibility to create applications without having to include a third-party. We provided blueprints and training on how to add to and customize the applications most relevant to the DoC team, which freed them from their 'submit–a–ticket' scenario. This resulted in transformative time-savings and cost-reduction. Everyone involved in the process can now enjoy a more flexible and intuitive user experience—all the way from creating an application to updating a workflow to filtering grants based on their needs.
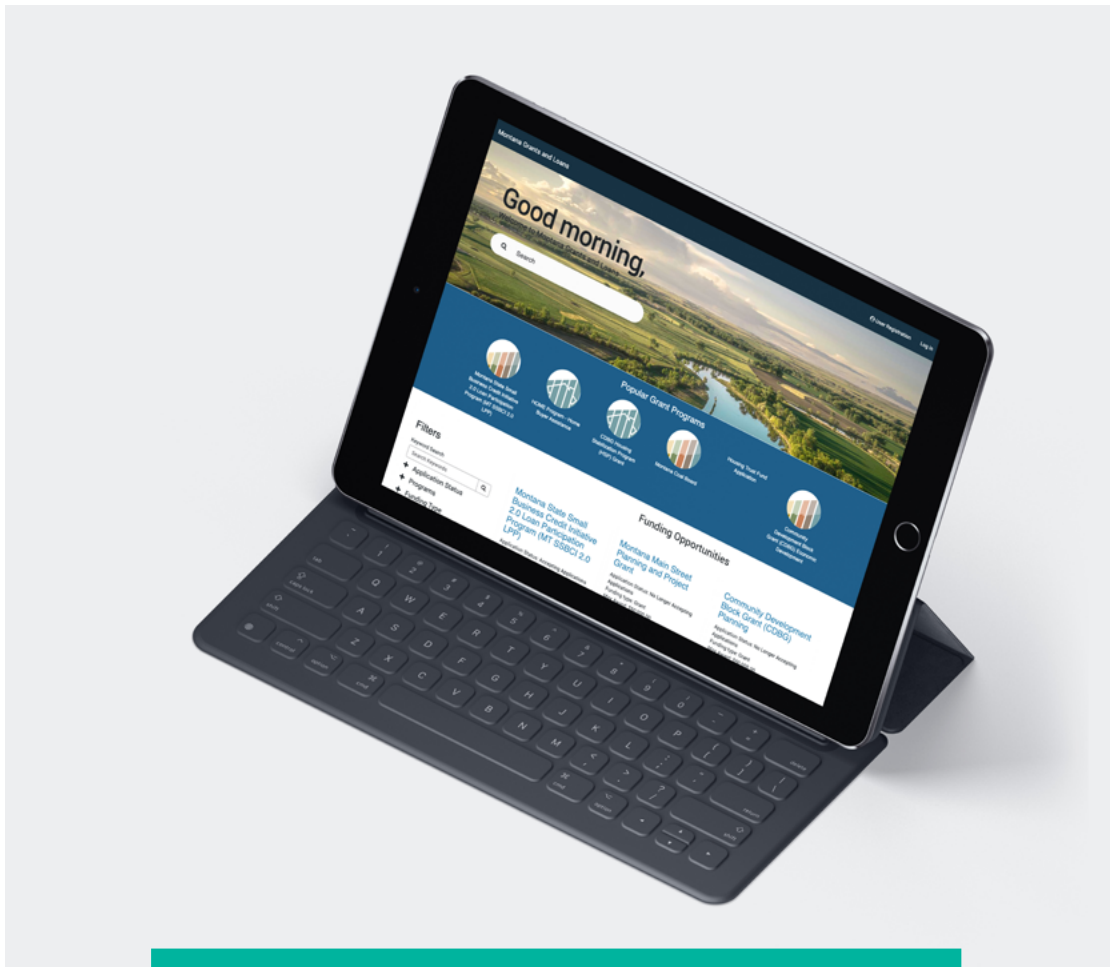
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