



# 4 Steps to Building a Modern Digital Forms Environment

Many government interactions rely on forms, from filling them out to routing them to the right place. That process depends on clean data and smooth workflows, but fragmented systems, manual workarounds and organizational silos often get in the way.

Agencies are turning to digital solutions to improve those experiences. With modern tools and a thoughtful approach to data collection, they can deliver constituent services that are both more effective and more efficient. At a recent [GovLoop event](#), government and data collection industry experts shared actionable strategies for modernizing forms.

## Participants included:

- **Charlie Clavelli**, Managing Principal, Eigen X
- **Buyan Thyagarajan**, Principal/Owner, Eigen X
- **Tricia Dreixler**, Senior Business Systems Analyst/Salesforce Admin and Team Lead, Multnomah County, Oregon
- **Joshua Strehle**, Director of Product Marketing, FormAssembly



## Start With a Strong Data Foundation

Government forms depend on the availability and reliability of both internal and external data. That data must be accurate and readily accessible. To build an effective digital forms environment, agencies need to start by taking a hard look at their data ecosystems. Here are two good ways to start:

### Focus on data cleanup on the front end.

Agencies need to address the condition of data in legacy systems and processes to ensure the quality of information feeding digital forms and streamline intake from the start.

“If we can make sure that we’re aggregating in an automated fashion, and that the checks along the way are automated as well, then we get to a point where we have a better process and usable, more readily available data,” said Charlie Clavelli of Eigen X.

**Eliminate data silos.** To modernize paper based processes, agencies need to ensure data can flow smoothly across systems. That requires breaking down the walls between data stores.

“If you’re seeing data silos at your organization, if you’re seeing things that are not working out, systems that are funneling data to the wrong areas or incorrect data” — those places are ripe for modernization, said FormAssembly’s Joshua Strehle.

## Strategize the Modernization Effort

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IT executives and business line leaders need to put a solid strategy in place to ensure a smooth and successful modernization effort. Two points to keep in mind:

**Think beyond quick fixes.** When investing in modernization, says Eigen X's Buyan Thyagarajan, agencies should take a long term view, choosing solutions that support the mission not just for three or six months, but for the next two to three years.

Agencies should also build compliance in from the start by incorporating appropriate safeguards into their modernization strategy. "Having the right controls in place helps them along the way," he said.

**Start with smaller pilots.** It rarely makes sense to try to boil the ocean in a modernization effort. Instead, agencies are better off isolating a promising use case and proving out the capability.

On the path to a digital forms environment, "let's do a three or six month pilot so we can actually see how it's going to work," Clavelli said. That approach helps generate buy in as the larger effort unfolds.

## Leverage Current Capabilities

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Modernized solutions can drive better outcomes across a wide range of forms driven processes and services. Here are two key ways agencies can take advantage of those capabilities:

**Automate and integrate workflows.** In Multnomah County, Tricia Dreixler has reduced manual effort by automating and integrating key workflows across multiple technology tools.

"Connecting our public touchpoints — specifically web forms — to our Salesforce system has had a tremendous positive impact across the county, supporting dozens of applications maintained by different departments," she said.

**Centralize and integrate data.** In the past, fragmented toolsets have handled different aspects of agency data, complicating forms based business functions.

"Now IT organizations are looking at having a single digital tool to centralize that data and tie it to core platforms," Thyagarajan said. "At the end of the day, data collection should integrate with backend systems."

## Keep in Mind the Big Picture

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Agencies succeed when they maintain a focus on high-level goals within the modernization effort. Remember these points:

**Validate AI outputs before scaling.** Digital forms give agencies an opportunity to start leveraging AI. For example, they can help constituents complete multi step forms and help staff verify that submissions are complete and accurate.

As these efforts expand, it's important to have systems in place to cross check AI outputs. "We just want to make sure that it's something we can trust before we move forward too quickly," Dreixler said.

**Look beyond forms.** Modernization isn't just about the forms themselves — it's about fixing the broken data processes behind them. To get the most value from digital forms, agencies need to examine the full ecosystem in which those forms operate.

"We see data collection processes far beyond forms," Strehle said. Identifying and addressing bottlenecks across that broader ecosystem will be key to a successful modernization effort.

*To learn more, watch the full session on demand.*