

E-PERMITTING & LICENSING MODERNIZATION



PROJECT OVERVIEW

A municipality required a digital platform to manage permit and license applications, streamline approval workflows, and improve visibility into regulatory processes. Existing processes relied on paper forms, email submissions, and disconnected systems, making it difficult for staff to track applications.

The solution implemented Salesforce as a centralized platform using Experience Cloud for applicant portals, OmniStudio for guided application intake, and Salesforce PSS workflows to digitize permit and license processes while improving transparency for municipal staff and applicants.

KEY CHALLENGES

- Permit and license applications managed through paper forms and email submissions, creating fragmented records and manual processing.
- Limited visibility into application status and review progress, making it difficult for staff to track approvals and timelines.
- Manual coordination between departments involved in application reviews and inspections.
- Limited reporting and operational insights into application volumes, processing times, and approval trends.

RESULTS AND IMPACTS

- ✓ **Reduced manual processing of permit applications through digital intake and automated workflows.**
- ✓ **Improved visibility into application status, processing timelines, and departmental workloads.**
- ✓ **Enhanced coordination between departments involved in permit and license approvals.**
- ✓ **Provided leadership with real-time reporting and dashboards for monitoring service performance.**

Solution Implemented

A Salesforce-based solution was designed to digitize the permit and licensing process while providing a centralized platform for application intake, review workflows, and operational reporting.

Using Experience Cloud portals, OmniStudio digital forms, and Salesforce Public Sector Solutions, the platform modernized municipal workflows through structured application submissions, automated approvals, and improved visibility across departments.

KEY CAPABILITIES DELIVERED

Online Permit & License Applications

Enabled applicants to submit permit and license applications through a digital Experience Cloud portal, including required documents and supporting information.

Automated Review Workflows

Configured structured workflows and routing to direct applications to relevant departments for review, approval, and inspection.

Document and Record Management

Centralized application documents, attachments, and review notes within Salesforce for easy access and collaboration by municipal staff.

Application Tracking and Notifications

Enabled applicants and staff to track application progress with automated notifications and real-time status updates.

Operational Reporting and Dashboards

Implemented Salesforce reports and dashboards to monitor application volumes, processing timelines, approvals, and departmental workloads.