

LEVERAGING CAMPUS TECHNOLOGY TO LAUNCH ELECTRONIC SIGNATURES AT SAN FRANCISCO STATE UNIVERSITY

FOCUS ON EFFICIENCY

The San Francisco State University Quality Assurance team successfully launched an electronic signature program across all campus locations using Zoom, a well-established web conferencing technology, to create a personalized, convenient and interactive training experience for faculty, staff and administrators at minimal cost.

The Quality Assurance team at San Francisco State University embarked on a multi-faceted outreach campaign to identify potential challenges and best understand employees' concerns regarding electronic signatures on campus.

From October 2017 to October 2018, the team performed more than 30 presentations for 350 faculty, staff and administrators, in addition to conducting a user feedback survey. The team determined that the main barriers for users regarding a new signature system were uncertainty about new technology and resistance to change. To address these challenges, Quality Assurance created customized training materials for DocuSign (a cloud-based electronic signature application) and leveraged the web conferencing technology Zoom, with which campus employees are already familiar, to deliver training on electronic signature fundamentals.

Previously, the main technology training options for employees were in-person sessions and online training series that accommodates different learning styles and accessibility needs. The 45-minute instruction provides a general introduction and allows users to become familiar with electronic signatures through hands-on experience and learn how to use electronic signatures in their day-to-day work.

Leveraging Zoom is instrumental in the implementation and adoption of electronic signatures at all four San Francisco State campus locations. The interactive training fosters open communication and encourages employees to provide feedback and ask questions. Therefore, Quality Assurance is able to address users' concerns and ensure they are comfortable using the tool.

In tandem with training, the team worked collaboratively with motivated employees to improve processes using lean methodology and process mapping. As of fall 2019, there are more than 70 processes approved for use with electronic signatures.

MILESTONES

Oct
2017

- Engagement begins and campus consensus is established for use of electronic signatures.

Mar
2018

- 20 DocuSign informational presentations are conducted with more than 250 total attendees.

June
2018

- Informational website about electronic signatures and service support debuts.

Aug
2018

- Zoom online training begins.

Jan
2019

- Electronic signatures for campuswide use commences.
- Improved training based on user feedback is offered.

Mar
2019

- 50 users are trained to use electronic signatures.

July
2019

- On-campus electronic signature users total 1,000.

QUANTIFICATION AND RESULTS

Through fall 2019, Quality Assurance has conducted 62 training sessions reaching more than 400 faculty and staff on campus. The average attendance rate for these sessions is 69 percent, which is 25 percent greater than the industry standard.

With more than 1,100 electronic signature users from 190 departments, the online training has resulted in enthusiastic adoption of electronic signatures across campus.

The program averages 105 new users per month.

More than 70 campus forms have been approved for electronic signature use. These forms originate from all divisions across campus.

With a proficient and motivated user base, the campus has smoothly transitioned to many paperless processes. Among six selected cases, the use of electronic signatures has reduced the average turnaround time by 73 percent versus the manual process turnaround. Campuswide, 78 percent of transactions sent via the new program were completed in less than one week.

With approximately 60 transactions sent electronically every workday, the university has saved more than 38,000 pages of paper since January 2019.

IMPACT AND BENEFITS

Offering interactive online training through Zoom has made electronic signatures more accessible to the campus community and has fostered adoption because users can visualize how to apply DocuSign in their day-to-day work.

Utilizing single sign-on authentication with electronic transactions has significantly enhanced the security of the signature process.

This program frees up time for staff and faculty to do more meaningful work.

PROJECT TEAM

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LESSONS LEARNED

- 1 Don't put technology ahead of people. For a successful implementation of electronic processes and new technology on campus, it is critical to understand the voice of the user and the existing manual process.
- 2 Don't try to reinvent the wheel. Use existing technology where possible to foster education and build user confidence.
- 3 Embrace change management on campus and tackle fear of change head on. The team's approach was to value people and leverage relationships as they focused on individual change management to ensure that all employees adopt the new program and are prepared to succeed.
- 4 Early and constant engagement paves the way for enthusiastic adoption.



San Francisco State project team members, from left, Cheryl Leung, Jesus Garcia, Andrea Whipple-Samuel and Michelle Wang.

PROJECT TEAM

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FURTHER REFERENCES

**San Francisco State DocuSign
webpage:**
<https://docusign.sfsu.edu/>