



Stage 1 Business Analysis

California Department of Technology, SIMM 19A.3 (Ver. 3.0.9, 02/01/2022)

1.1 General Information

1. Agency or State Entity Name: 7760 - General Services, Department of

If Agency/State entity is not in the list, enter here with the [organization code](#).

[Click or tap here to enter text.](#)

2. Proposal Name and Acronym: Office of State Publishing (OSP) Customer Communications Management (CCM) Platform

3. Proposal Description: (Provide a brief description of your proposal in 500 characters or less.)

The Office of State Publishing (OSP) seeks to identify and procure a comprehensive Customer Communications Management (CCM) Platform to help expand business opportunities and revenue. A CCM tool with a workflow intake solution would help OSP take on work currently exempted to the private sector and reduce the time it takes to onboard new customers and workload. Additionally, it would enable OSP to automate the creation, design, and delivery of personalized communications across multiple channels; provide electronic document distribution (in addition to traditional print services); boost revenue growth opportunities; and provide comprehensive printing, publishing, and document management solutions to support the operational needs of state agencies and public sector clients. Overall, the proposed CCM will help OSP provide consistent business processes for customer onboarding, reduce training and cross-training needs for staff, and offer a collaborative customer experience to help open the door for future growth opportunities.

4. Project Planning Start Date: 6/9/2025

5. Proposed Project Execution Start Date: [Click or tap to enter a date.](#)

6. S1BA Version Number: Version 1

1.2 Submittal Information

1. Contact Information

Contact Name: **Justin Sanchez**

Contact Email: **Justin.Sanchez@dgs.ca.gov**

Contact Phone: **279.799.4258**

2. Submission Type: **New Submission**

If Withdraw, select Reason: **Choose an item.**

If Other, specify reason here: **Click or tap here to enter text.**

Sections Changed, if this is a Submission Update: (List all sections changed.)

Click or tap here to enter text.

Summary of Changes: (Summarize updates made.)

Click or tap here to enter text.

3. Attach **[Project Approval Executive Transmittal](#)** to your email submission.

4. Attach **[Stage 1 Project Reportability Assessment](#)** to your email submission.

1.3 Business Sponsorship

1. Executive Champion (Sponsor)

Title: **State Printer**

Name: **Lou Butera**

Business Program Area: **DGS Office of State Publishing**

2. Business Owner

Title: **Assistant State Printer**

Name: **Norma Kreider**

Business Program Area: **DGS Office of State Publishing**

3. Product Owner

Title: **Operation and Business Development Specialist**

Name: **Ali Sher**

Business Program Area: **DGS Office of State Publishing**

TIP: Copy and paste or click the + button in the lower right corner on any section to add additional Executive Champions, Business Owners, or Product Owners with their related Business Program Areas as needed.

1.4 Stakeholder Assessment

The Stakeholder Assessment is designed to give the project team an overview of communication channels that the state entity needs to manage throughout the project. More stakeholders may result in increased complexity to a project.

1. Indicate which of the following are interested in this proposal and/or the outcome of the project. (Select 'Yes' or 'No' for each.)

State Entity Only: **Yes**

Other Departments/State Entities: **Yes**

Public: **No**

Federal Entities: **No**

Governor's Office: **No**

Legislature: **No**

Media: **No**

Local Entities: **No**

Special Interest Groups: **No**

Other: **No**

2. Describe how each group marked 'Yes' will be involved in the planning process.

State Entity - The Department of General Services' Enterprise Technology Solutions (ETS) and OSP teams will partner in the planning process to gather user/system requirements, conduct market research of potential solutions, and document software/hardware needs that do not require significant customization. This work will lead to the development of a solicitation to procure the appropriate CCM Platform and a qualified system integrator to help OSP improve efficiency and expand business opportunities and revenues.

Other Departments/State Entities - OSP provides print services to State of California departments and agencies such as the Department of Motor Vehicles, among many others. OSP customers (departments/state entities) will not be directly involved in the planning process; however, they will be made aware of the new CCM Platform go-live implementation timeline to help onboard them and maximize the services available to them in order to meet their printing needs.

1.5 Business Program

1. Business Program Name: Office of State Publishing

2. Program Background and Context: Provide a brief overview of the entity's business program(s) current operations.

OSP is a division within the DGS that provides comprehensive printing, publishing, and document management solutions to support the operational needs of state agencies and public sector clients. OSP specializes in secure printing, digital publishing, mailing and fulfillment services, and electronic document workflows.

3. How will this proposed project impact the product or services supported by the state entity?

The proposed CCM Platform will allow OSP to take on work currently exempted to the private sector and reduce the time it takes to onboard new customers and workload. Furthermore, the proposed CCM solution will centralize intake processes for OSP, create a seamless and collaborative customer experience during the new workload onboarding process, and include flexible role-based access controls to balance security and accessibility.

TIP: Copy and paste or click the + button in the lower right corner to add Business Programs, with background and context and impact descriptions as needed.

1.6 Project Justification

1. Strategic Business Alignment

Enterprise Architect

Title: Department of General Services, Enterprise Technology Services

Name: Ashok Gupta

Strategic Plan Last Updated? **1/1/2025**

Strategic Business Goal: **Grow the Business**

Alignment: OSP operates on an economy of scale. By onboarding more customers and increasing the workload (i.e., growing the business), OSP increases its operational efficiency. When OSP is forced to exempt work to the private sector, it cannot generate revenue, yet it remains fixed with many costs, such as idle print equipment, mail equipment, and respective staff. The proposed CCM Platform will allow OSP to onboard work exempted to the private sector due to the lengthy onboarding time deemed unacceptable for many customers. By improving onboarding times and securing additional work, OSP will generate increased revenues, faster cost recoveries, and reduced fixed expenses.

TIP: Copy and paste or click the + button in the lower right corner to add Strategic Business Goals and Alignments as needed.

Mandate(s): **None**

Bill Number/Code, if applicable: [Click or tap here to enter text.](#)

Add the Bill language that includes system-relevant requirements:

[Click or tap here to enter text.](#)

TIP: Copy and paste or click the + button in the lower right corner to add Bill Numbers/Codes and relevant language as needed.

2. Business Driver(s)

Financial Benefit: Yes

Increased Revenue: **Yes**

Cost Savings: **No**

Cost Avoidance: **No**

Cost Recovery: **No**

Will the state incur a financial penalty or sanction if this proposal is not implemented? **No**

If the answer to the above question is "Yes," please explain:

[Click or tap here to enter text.](#)

Improvement

Better Services to the People of California: **Yes**

Efficiencies to Program Operations: **Yes**

Improved Equity, Diversity, and/or Inclusivity: **No**

Improved Health and/or Human Safety: **No**

Improved Information Security: **No**

Improved Business Continuity: **Yes**

Improved Technology Recovery: **No**

Technology Refresh: **Yes**

Technology End of Life: **No**

1.7 Business Outcomes Desired

Executive Summary of the Business Problem or Opportunity:

OSP seeks to implement a comprehensive CCM Platform to help expand business opportunities and revenue. Additionally, the CCM Platform will enable OSP to automate the creation, design, and delivery of personalized communications across multiple channels; provide electronic document distribution (in addition to traditional print services); boost revenue growth opportunities; and provide

comprehensive printing, publishing, and document management solutions to support the operational needs of state agencies and public sector clients.

Increased Revenue

A centralized CCM Platform will open the door for revenue growth opportunities by offering new and existing customers the ability to create multi-channel communication campaigns.

Program Operation Efficiencies

The centralization of onboarding workflows will provide consistent business processes for customer onboarding, reduced training and cross-training needs for staff, and offer a collaborative customer experience. As a result, this will help reduce the timeframe to onboard new workload and open the door for future growth opportunities.

Technology Refresh

Implementing a centralized CCM Platform to enhance customer experience and permit collaborative content authoring will help open the door for future growth opportunities and boost revenue. The proposed system will also uphold privacy/security standards for customer peace of mind.

Objective ID: 1.0

Objective: Offer new and existing customers the ability to create multi-channel communication campaigns.

Metric: The ability to offer multi-channel communication campaigns.

Baseline: This functionality does not exist at OSP.

Target Result: OSP will be able to increase revenue by offering multi-channel communication campaigns to new and existing customers.

Objective ID: 2.0

Objective: Reduce the timeframe to onboard new workload by providing customers with a collaborative, consistent onboarding process.

Metric: The established timeframe to onboard new workload.

Baseline: Current estimate of OSP staff time spent onboarding new workload per annum: approximately 4,376 hours.

Target Result: 20% reduction in time to onboard new workload from the current annual baseline.

Objective ID: 3.0

Objective: Provide information security for the customer data collected by OSP and stored within the CCM Platform. Furthermore, protect confidential customer data from being accessed by those with malicious intent and ensure compliance with state and federal standards.

Metric: Create a report to ensure role-based access controls are appropriately mapped.

Baseline: This functionality does not exist at OSP. The new CCM Platform will incorporate this feature after implementation.

Target Result: Upon implementation, the new CCM Platform will utilize a role-based access controls report to ensure users have limited access to appropriate customer data.

TIP: Copy and paste or click the + button in the lower right corner to add Objectives as needed. Please number for reference.

TIP: Objectives should identify WHAT needs to be achieved or solved. Each objective should identify HOW the problem statement can be solved and must have a target result that is specific, measurable, attainable, realistic, and time bound. Objective must cover the specific. Metric and baseline must detail how the objective is measurable. Target Result needs to support the attainable, realistic, and time-bound requirements.

1.8 Project Management

1. Project Management Risk Score: 0.5

Follow the instructions in [Statewide Information Management Manual \(SIMM\) Section 45 Appendix B Project Management Risk Assessment Preparation Instructions](#).

Attach a completed [Statewide Information Management Manual \(SIMM\) Section 45 Appendix A Project Management Risk Assessment Template](#) to the email submission.

2. Project Approval Lifecycle Completion and Project Execution Capacity Assessment

Does the proposal development or project execution anticipate sharing resources (state staff, vendors, consultants, or financial) with other priorities within the Agency/state entity (projects, PALs, or programmatic/technology workload)?

Answer: Yes

Does the Agency/state entity anticipate this proposal will result in the creation of new business processes or changes to existing business processes?

Answer (No, New, Existing, or Both): Both New and Existing Processes

1.9 Initial Complexity Assessment

1. Complexity Assessment (Business Score): 1.2

Follow the instructions in the [Statewide Information Management Manual \(SIMM\) Section 45 Appendix D Complexity Assessment Instructions](#).

Attach a completed [Statewide Information Management Manual \(SIMM\) Section 45 Appendix C Complexity Assessment Template](#) to the email submission.

NOTE: Business complexity is initially completed in PAL Stage 1. Technical complexity is initially completed in PAL Stage 2.

2. **Noncompliance Issues:** Indicate if your current operations include noncompliance issues and provide a narrative explaining how the business process is non-compliant.

Programmatic regulations: **No**

HIPAA/CIIS/FTI/PII/PCI: **No**

Security: **No**

ADA: **No**

Other: **No**

Not Applicable: **No**

Noncompliance Description:

N/A

3. Additional Assessment Criteria

If there is an existing Privacy Threshold Assessment/Privacy Information Assessment, include it as an attachment to your email submission.

How many locations and total users is the project anticipated to affect?

Number of locations: **2**

Estimated Number of Transactions/Business Events (per cycle): **Click or tap here to enter text.**

Approximate number of internal end-users: **Click or tap here to enter text.**

Approximate number of external end-users: **Click or tap here to enter text.**

1.10 Funding

Planning

1. Does the Agency/state entity anticipate requesting additional resources through a budget action to **complete planning** through the project approval lifecycle framework? **No**

If Yes, when will a budget action be submitted to your Agency/DOF for planning dollars?

Click or tap to enter a date.

2. Please provide the Funding Source(s) and dates funds for planning will be made available:

Planning will be funded via department funds. No external funding is being requested.

Project Implementation Funding

1. Has the funding source(s) been identified for **project implementation**? **No**

If known, please provide the Funding Source(s) and dates funds for implementation will be made available:

[Click or tap here to enter text.](#)

Will a budget action be submitted to your Agency/DOF? **Choose Yes or No.**

If “Yes” is selected, specify when this BCP will be submitted: [Click or tap here to enter text.](#)

2. Please provide a rough order of magnitude (ROM) estimate as to the total cost of the project:
[Less than \\$10 Million](#)

End of agency/state entity document.

Please ensure ADA compliance before submitting this document to CDT.

When ready, submit Stage 1 and all attachments in an email to ProjectOversight@state.ca.gov.

Department of Technology Use Only

Original "New Submission" Date: [10/10/2025](#)

Form Received Date: [10/10/2025](#)

Form Accepted Date: [10/10/2025](#)

Form Status: [Completed](#)

Form Status Date: [10/10/2025](#)

Form Disposition: [Approved](#)

If Other, specify: [Click or tap here to enter text.](#)

Form Disposition Date: [10/10/2025](#)

Department of Technology Project Number (0000-000): [7760-323](#).