Q&A Steve Witt, Director of Public Sector, Nintex

Federal News Network: Tell us about your app.

Steve Witt: Nintex DocGen for Salesforce is an AppExchange application that does dynamic document creation. It is completely built from the ground up for the Salesforce AppExchange.

It takes unstructured data from Salesforce, from a wide variety of Salesforce objects, and assembles them into the documents required by the government. Everything from loan documents for government programs to permits and voter registration cards. Any time you want to take that data and build a document, we call it "DocGen." The way we do it is quickly, easily, with no coding required — and all run within Salesforce.

Our AppExchange app is both powerful and secure with an AWS GovCloud back end that is FedRAMP-authorized. Nintex can solve a lot of really complex problems, build dynamic documents with a lot of different business logic built in so that when the end user says, "I want this document," it is completely automated with a push of a button. They don't have to lift a finger.

Federal News Network: When you say minimal coding, how does that work?

Witt: Yes, there's low code, which is what Salesforce is. We built off that model, making it really easy to build complex document packages.

For example, if you've ever done a mail merge in Microsoft Word, where you say, "I want to put the first name here, and the last name here," it's that type of approach.

We can add a lot of sophistication more than just simple tags for whatever piece of data you want into an Office template, whether it be Word, Excel or PowerPoint. You put it in right where you want, and we dynamically build it out from that.

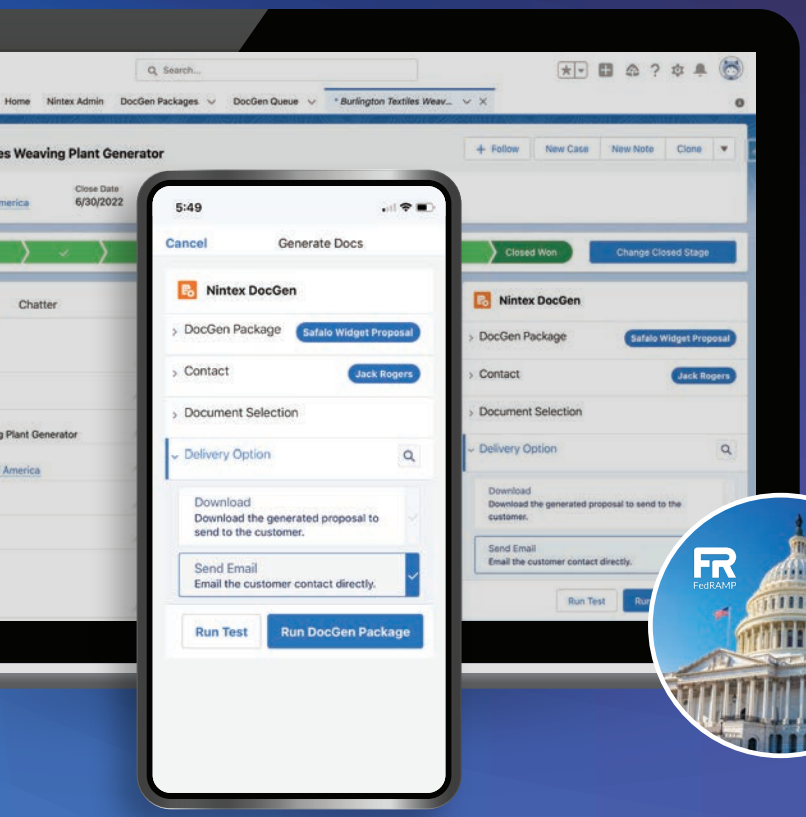
It's not true drag and drop like our popular workflow and forms technology, but it's using tools that people are familiar with and comfortable with, which is typically Microsoft Word. You're not doing HTML markup, which is what some of the other similar kinds of document generation tools use.

Federal News Network: Why should government organizations use your app?

Witt: To accomplish these types of outcomes within Salesforce, you would typically have to do custom Apex coding in order to build it out, which may require you to pay a developer to do it. This would consume valuable development resources, time and money. It would also need to be maintained — things change over time.

A great example would be voter registration cards. Every year, you need to update it. We make it really easy to go out and maintain it with our solution and not have to go into code to make updates. It becomes easy to create, easy to maintain going forward and not having to spend budget on development cycles or development resources to build these solutions.

The alternative is to write and maintain custom Apex code, which requires an advanced skill set and takes more time. This is a faster way to develop it and an easier way to maintain it.



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Federal News Network: So just to clarify, is this a public-facing document that government agencies would be uploading to their website for people to fill out? Or is this an internal document they would use for compliance and regulation purposes? What kind of documents exactly?

Witt: It is both. One of the things that we've seen in public sector in the adoption of Salesforce is using the Salesforce community to provide a citizen experience.

I'll give you a real-world use case: You operate a childcare center, a daycare center, and every year you're required to go through a licensing process. To do that you'll type the data directly into Salesforce, but the output of that is ultimately a PDF document that you need to sign and that is stored long term for audit and compliance purposes. Documents can be internal-facing for the government agency, but they also can be citizen-facing.

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Salesforce makes it really easy to fill out the dynamic forms and gather the data, and then we assemble it into something that is more permanent. I'm sure you've seen government forms. They're not the prettiest or the most exquisite looking forms if they're printed out. Salesforce, particularly with the Lightning interface, makes it easy for users to provide and update data. But at the end of the day, the government often times still wants the data rendered out in a very specific format.

Federal News Network: Talk about the benefits your company has received from being in the AppExchange.

Witt: It's been tremendous for us. Nintex has been in the AppExchange almost since its inception. The AppExchange allows organizations like Nintex, that work with Salesforce and create these types of solutions for government, to offer an easy way for the customer to add it to their environment — a "try it out it before they buy it" approach.

It allows us to deliver value very quickly, because users don't have to worry about a lengthy install process. It's all right there. The AppExchange is a nice framework for us as a software company to build a product that is easily deployable for the end user. It removes a lot of the risk involved for customers wanting to onboard new technology. For us, it works really well because our focus is making it easy for customers to use.

Federal News Network: Something we hear a lot from federal agencies is that whenever they need a new application, the budgeting and acquisition process is so long. Does this simplify that whole process for government customers trying to bring in a new application?

Witt: Correct. For example, when a government agency is looking for a solution that does permitting or licensing applications, and they say, "These are the core Salesforce components I need," and here are the AppExchange components as well, it becomes one solution, one purchase and one onboarding.

Because we inherit a certain level of the security from Salesforce itself, it makes it a lot easier for a government agency to onboard as one solution — as opposed to going out and buying three or four distinct software as a service products and trying to make them all work together.

Federal News Network: Can you share what's unique in the integration and the benefits of DocGen?

Witt: One of the things that makes us unique is we bring all the power and security of a FedRAMP, GovCloud-hosted SaaS product to the AppExchange. That allows us to do things that are far more powerful in terms of document automation. We can solve far more complex problems. We can build out government documents that are hundreds of pages long. We can do it in a way that's really easy and secure.

Federal News Network: Can you share real-life examples of how you help government organizations?

Witt: One example is providing benefits to businesses or individuals impacted by a natural disaster. These citizens are entitled to benefits from the government to help aid in their recovery. Any time there's a hurricane, tornado or other natural disaster, they can get immediate access to relief funds.

To do that, you can imagine the paperwork involved, that citizens need to fill out, and that the government needs to process. When there's a hurricane and you have hundreds, if not thousands of people impacted, they all put a rush on the

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system. Salesforce and Nintex are at the heart of the solution.

The document automation that Nintex provides allows for the documents for each loan to be customized automatically based on hundreds of lines of business logic. Things like terms and conditions are added on the fly. Our e-signature tool allows people to authorize and sign the documents on the spot, and then it is immediately routed to a government representative to sign and process. This saves time on all fronts and ensures citizens get the benefits they need fast.

Federal News Network: With the government's current focus on customer experience, one of the big areas of opportunity that they're looking to work on is reducing duplicative paperwork. Would your app allow information to be filled out one time and then distributed across all the relevant documents?

Witt: Absolutely. That's where Salesforce and Nintex really shine. If the data is in Salesforce we can pull it so they don't have to reenter it repeatedly.

Another example that shows the value of Nintex and is a bit unique is an agency that we work with that leverages Salesforce for a number of their internal programs. One is for program management, and they use Nintex DocGen to dynamically generate PowerPoint documents monthly or quarterly for executive-level updates on the program.

Instead of a human having to go in and prepare the data, run these reports and then build a PowerPoint, they click a button. There's a template that goes out and grabs all this data from Salesforce and assembles it into their monthly or quarterly update. This saves the agency hundreds of hours each quarter.

Federal News Network: That seems like it would make compliance reporting really easy.

Witt: Exactly. As long as you have access to all that data: "When's the last time we did this? When was the last inspection? What were the findings?" then you can put that in a report. Typically stuff that people would have to do manually, you can do as long as they log it in Salesforce. You log it once, and then you can get it in different output formats.

Federal News Network: Is there anything else that we haven't touched on that you really want to share about your company or your app?

Witt: The last piece is we've recently acquired another company, an e-signature company that also had its AppExchange app for a long time. We call it Nintex AssureSign, and we're joining those together as part of our roadmap long term.

You'll also be able to do both document automation and document signatures all in one AppExchange app. If you look at what's coming, we're continuing to invest in building out and making our AppExchange application more powerful and allowing users to do more, not just the creation of the document but also add and manage the signatures that are required.