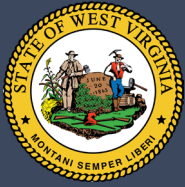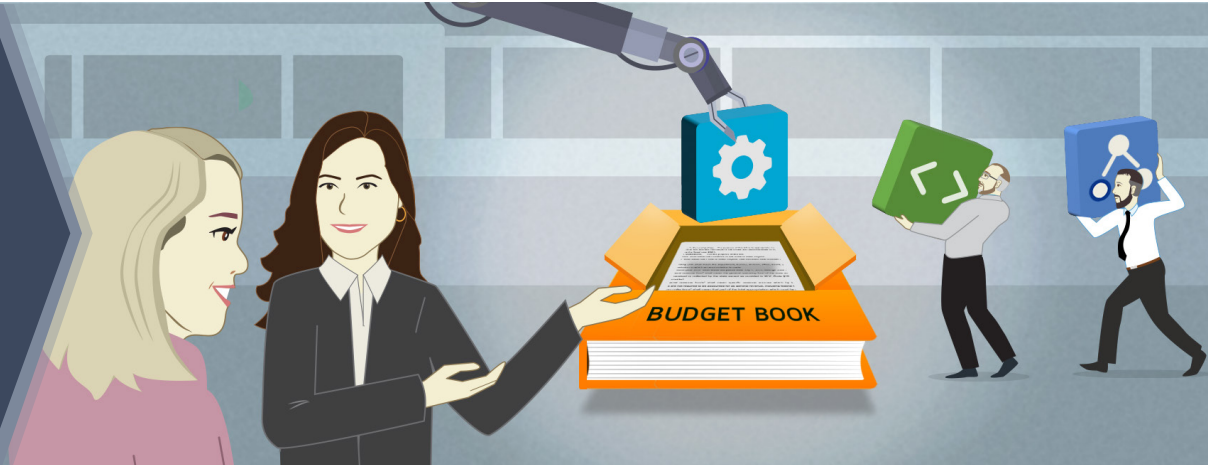# West Virginia Team Automates More Than 90% of Budget Book

Population:
1.78 million (2021)

Solutions:
Workiva Wdesk & Wdata

The Challenge

When we first spoke with the State of West Virginia (WV) budget office team, they were looking to automate their process for producing Volume II of their annual budget book. Heather Greenfield, Budget Analyst, explained that the team's existing process was "all manual…you're talking about the…domino effect… so, if you made one change, it would hit 12 different places across several different books—thousands of pages—and you'd have to remember where all of those were."

LEAVE NOTHING TO CHANCE

"Oh God, all the scripting and behind-the-scenes kind of work, just that initial lift? I think it would have been so overwhelming to try and figure it out ourselves. And it wouldn't have taken a couple of…months, it would have taken us a year… it made it so much nicer to have F.H.Black…having that support [while] learning something has been incredibly valuable."

Heather Greenfield,
Budget Analyst, West Virginia State Budget Office

How It Went

With their 2024 budget book recently completed, WV sat down with us to discuss the project's implementation and outcomes.

"Personally, I've never gone through an implementation where I was so heavily involved. Most of the ones I've gone through…had a tech team heading up the project, so this was pretty 'hands-on' for us. But it was good… I think it helped us learn what to do and troubleshoot a lot more than if we hadn't been so hands-on," said Misty Reese, the office's Deputy Director.

FHB Principal Consultant Jill Moats, CPA, and her team set up custom queries, tables, and scripting to automate WV's narratives, eliminating the need to update each one manually and the risk associated with doing so. FHB also provided WV with full documentation of their configuration, with step-by-step instructions for updating scripts, creating new groups, and more. This documentation will be particularly helpful as the office brings new employees on board.

"There was very little that we had to do manually, besides setting it up as a one-time thing…and we have a colossal amount of data. It was pretty impressive," said Heather.

State of West Virginia

An Expert Team

Throughout the project, the WV team was in Jill's capable hands. Her public-sector accounting expertise was immediately evident, said Heather. "Every state or project is going to be different, but I felt like—even for our most complicated tasks or procedures, different accounting techniques, or details specific to us—she was able to pick up on those pretty quickly."

LEAVE NOTHING TO CHANCE

"[Jill] would say, 'this might be a little bit time consuming in the future' and tweak things [to get us] what we needed more quickly. She [adjusted]… our formulas or the different sections of our book to make it easier on us… and that was super helpful."

Misty Reese,
Deputy Director, West Virginia State Budget Office

Staying on Track

WV was also pleased with FHB's project management approach. "[Their tool] worked really well. It was helpful to go in and see exactly what I had to do, and if I was behind deadline," said Heather. "And then also having the links to…a Microsoft Teams meeting, or file or video links, all in one place. It kept the whole thing organized," she said.

A Measurable Outcome

With the help of FHB, the WV team successfully automated more than 90 percent of their budget book document.

For the first time, Heather and her team were able to beat the book's deadline by several hours. "You don't finish Volume II early. And it was done two hours early. It was crazy," she said.
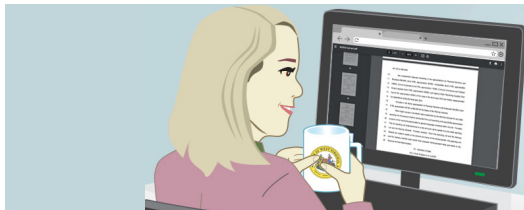
What's Next

"In the past, sometimes we didn't even have time to proof our books. There were so many changes and… we were doing all this manual work…we just sent them off because we're required to do so. Now, we don't have to worry about those little embarrassing errors. We can go through and read the books, we can do analysis if we want to," said Heather.

The WV team plans to make the most of its new setup. "The goal is to add other volumes…and that will save even more time…there are so many possibilities," she said.

With all the time they've saved through automation, the WV team looks forward to producing a better-quality product and taking on higher-level tasks.

FHB LEAVE NOTHING TO CHANCE

For more than 25 years, we have ensured public sector finance & budget departments like yours optimize their most challenging and time-consuming processes.
Automating the drudgery to focus on high-value work is so essential to our clients that they choose to Leave Nothing to Chance. They engage us to review their processes, recommend, implement & support the ideal enabling technologies and best practices.

Book a meeting to discuss how we can automate your Budget Book process.

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