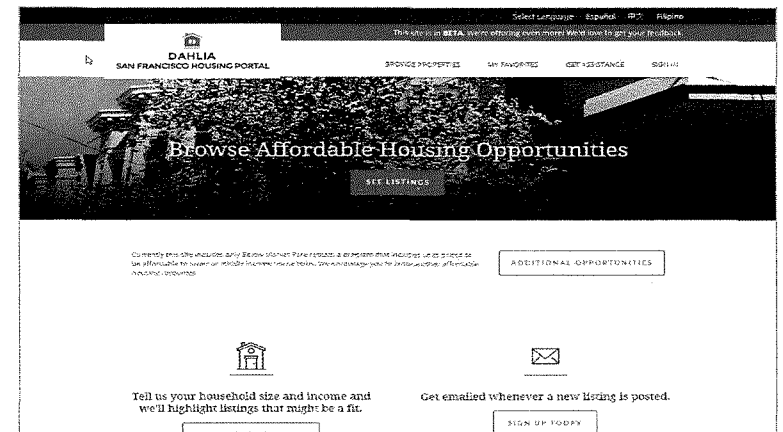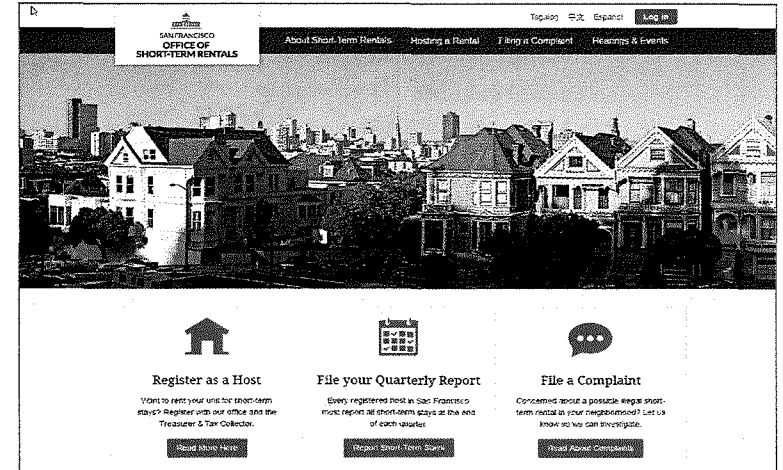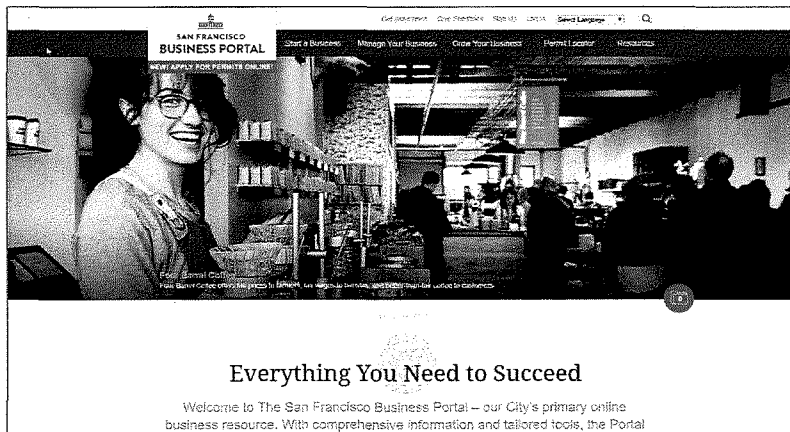San Francisco Business Portal

Mar 9, 2016

First Iteration — November 2014

- Launched November 2014
- User-centered research, design, and content curation
- CON focus on offline process improvement/streamlining
- Go-to online resource to start, manage, and grow your SF business
- 18 permitting depts - 400+ permit application forms
- Leveraged work completed to:
  - Standardize & scale across other departments
  - Collaborate with other municipalities

2nd Release – August 5, 2016

Key New Features

User-generated and authenticated profiles integrated with Salesforce.com Platform allows users to:

- Store relevant permit application forms, Starter Kits, and additional resources

- Plan and track progress interactively, via imported Checklist Templates by business type, creating Checklists from scratch, or a combination of the two

- Submit permits online, directly through the user's profile

- Save & centralize commonly required permit application files

- Dramatically improved data gathering, reporting, and process transparency

- Additional language options via Google Translate

- New high-traffic & value-add Starter Kits

User-Authenticated Profile Accounts

Log in

Email

Email

Password

Password

[Log In]   I forgot my password : I am a new user

My Account

Update your contact information or change your password.

MY FOLDER

Starter Kits (1)
Documents (1)
Permits & Licenses (13)

MY FILES

MY ACCOUNT

MY CHECKLISTS

Test

Edit   Change Password

⌄ My Information

First name:
Jason

Last name:
Eh

Email:
jasonhemmerle+817@gmail.com

Online Permit Applications

SAN FRANCISCO
BUSINESS PORTAL

Start a Business   Manage Your Business   Grow Your Business   Permit Locator   Resources

NEW! APPLY FOR PERMITS ONLINE!

MY FOLDER

Starter Kits (1)
Documents (1)
Permits & Licenses (13)

MY FILES

MY ACCOUNT

MY CHECKLISTS

Test

Starter Kits (1)

> Short-Term Residential Rental Starter Kit   ✕

Documents (1)

> Preparing for Heavy Rain   👁 ⬇ ✕

Permits & Licenses (13)

> New Business Registration   **Submitted** ✅ 👁

> Health Permit to Operate - Restaurants, Bars, and Retail   ✔ 👁
Food Markets

> Short-Term Residential Rental Requirements   👁 ✕

> Vehicle Repair Garage Permit, Minor   🗗 👁 ✕

Consolidate & Store Files for Future Applications

SAN FRANCISCO
BUSINESS PORTAL

Start a Business   Manage Your Business   Grow Your Business   Permit Locator   Resources

NEW! APPLY FOR PERMITS ONLINE!

My Files

Store copies of your Business Registration, proof of payment, and other frequently used files and easily attach to permit applications for online submission."

MY FOLDER

Starter Kits (1)
Documents (1)
Permits & Licenses (13)

MY FILES

MY ACCOUNT

MY CHECKLISTS

Test

Files

Short_Term_Rental_Application.pdf	⬇	✕
PPA Sample.docx	⬇	✕
Drawing_Form Builder Tool editsJBH.docx	⬇	✕

Upload a file

Choose File No file chosen   **Upload file**   (Maximum 10 MB)

> Fictitious Business Name   ☑ 👁 ✕

> Employer Identification Number (EIN)   👁 ✕

> Fictitious Business Name   ☑ 👁 ✕

˅ Health Permit to Operate - Restaurants, Bars, and Retail   👁 ✕
Food Markets

All restaurants, bars, and retail food markets must obtain a permit to operate from the Department of Public Health. This application packet includes the required forms and procedures to apply online.

> Application for Food Permit to Operate   📎 ⬇

> Copy of check

˅ Business Registration

Select from My Computer   **Attach File**   or | PPA Sample.docx ▼ | **Attach File**

☑ Save to My Files   (Maximum 10 MB)
Select from My Files
Short_Term_Rental_Application.pdf
PPA Sample.docx
Drawing_Form Builder Tool editsJBH.docx

> Drawing

Interactive Checklists

SAN FRANCISCO
BUSINESS PORTAL

Start a Business   Manage Your Business   Grow Your Business   Permit Locator   Resources

NEW! APPLY FOR PERMITS ONLINE!

Add New Checklist

MY FOLDER

Starter Kits (1)
Documents (1)
Permits & Licenses (14)

MY FILES

MY ACCOUNT

MY CHECKLISTS

Research Lenders
Journey Map
Possible Locations

> **Research Lenders**   Add a template: Select   Status: Active

---

∨ **Journey Map**   Add a template: Select   Status: Active

Starter Kit Template

Add task

Find a location and visit the Planning Info Center   Not Started   ✗

Find a location zoned for your business and visit the SF Planning Department to understand zoning and building codes before signing a lease. http://businessportal.sfgov.org/start/find-a-location

Review DPH Construction Guidelines and visit the SF Fire Department   Not Started   ✗

Find out if you need to make changes to your space. Things to consider are sprinkler systems, kitchen hoods, fire exits, capacity requirements, etc. http://businessportal.sfgov.org/start/building-inspections/building

Review Americans with Disability Act (ADA) guidelines   Not Started   ✗

Your business must be accessible. It's the law! http://businessportal.sfgov.org/start/building-inspections/ada
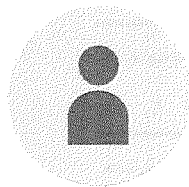
Choose a business structure and create a plan   Not Started   ✗
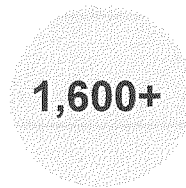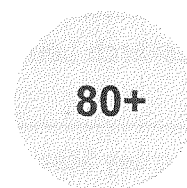
Analytics (Nov 2014 – Jan 2017)

483K
Total Page Views

109K
Total Users
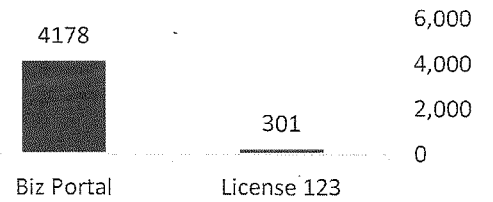
1,600+
User-generated Profiles

80+
Authenticated User Log-ins/week

Average Monthly Users
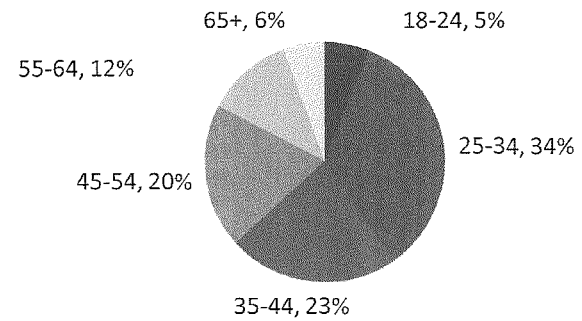
4178

301

Biz Portal   License 123

6,000
4,000
2,000
0

44%
San Francisco Users

8%
Other Bay Area Users

65+, 6%   18-24, 5%

55-64, 12%

45-54, 20%

25-34, 34%

35-44, 23%

Age Breakdown

Next Steps – Phase III

Enhancements

- Develop Web-forms & back end permit application workflows
- Integrate permit forms with Digital/Electronic Signature provider (DocuSign)
- Implement Electronic Payment functionality for license/permit fees (FIS)
- Allow data pre-fill to auto-populate directly from user-profile
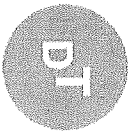
Ongoing Maintenance

- Continue improving user-experience through testing & iterative design
- Update content as legislation and needs change, especially permits and starter kits
- Create new content (Starter Kits, TTX New Biz Registration, Gross Receipts Tax, etc.)
- Regularly audit/update links and permit forms
- Install Drupal security updates as necessary
- Maintain & plan to operationalize at OSB in FY17-18

Supporters

Sponsoring Departments

City & County of San Francisco
**Office of
the Mayor**

City & County of San Francisco
**Department of
Technology**

SAN FRANCISCO
Office of Economic and
Workforce Development

City & County of San Francisco
**Office of Small
Business**

Key Process Improvement Partners

Board of Supervisors
Department of Building Inspection
Department of Public Health
Fire Department
Office of the Assessor-Recorder
Office of the Controller
Office of the Treasurer and Tax Collector
Planning Department
Small Business Commission