

Vital Records Modernization: A Checklist for Gaining Leadership Buy In

**A practical guide for agencies seeking support, funding,
and momentum in 2026.**

Modernizing Vital Records operations is no longer optional — it's essential for security, data quality, service delivery, and resiliency. Yet even the most compelling modernization projects can stall without strong executive and legislative support. This one page checklist helps leaders quickly build a clear, persuasive case for modernization that resonates with agency decision-makers.



1. Clearly Define the Problem — and the Risks of Doing Nothing

Leaders need to see **why** change is necessary and often urgent.

- ✓ Identify gaps in current systems or processes (e.g., manual work, outdated technology, compliance risks).
- ✓ Highlight risks associated with maintaining the status quo: fraud exposure, system outages, slow turnaround times, or inability to meet growing service demands.
- ✓ Emphasize how improved system efficiencies, automation, and process improvement leads to better customer service, reduced backlogs, reduced customer complaints, and increased employee satisfaction.
- ✓ Frame modernization as a risk mitigation and resiliency investment, not just an IT upgrade.



2. Quantify Current Pain Points to Strengthen Your Case

Numbers help decision-makers understand the magnitude of the challenge.

- ✓ Document backlogs, customer complaints, and staff hours spent on manual tasks.
- ✓ Show trends in data quality issues or error rates.
- ✓ Identify cybersecurity vulnerabilities or audit findings that modernization would address.
- ✓ Translate inefficiencies into positive workforce, operational and financial impacts.



3. Align the Modernization Vision with Agency-Wide Goals

Modernization succeeds when it's tied to broader priorities. Common connections include:

- ✓ **Improved Access:** Modernizing can reduce barriers and simplify access for customers.
- ✓ **Digital Government:** Supporting statewide digital transformation initiatives.
- ✓ **Resiliency:** Strengthening continuity of operations and disaster preparedness.
- ✓ **Public Health:** Improving data timeliness and accuracy for surveillance and reporting.
- ✓ **Workforce Engagement:** Reducing manual work to sustain service levels amid staffing shortages.

Make it easy for leaders to see how your proposal advances their own strategic goals.



4. Use Success Stories From Other States to Build Confidence

Leadership wants proof that it works.

- ✓ Share examples of peer states that improved security, reduced backlogs, or delivered better customer service after modernization.
- ✓ Highlight benefits such as faster certificates, fewer errors, fraud reduction, or stronger analytics.
- ✓ Use case studies that match your state's size, structure, or constraints for maximum credibility.

Conversely, in some cases, it is also helpful to share examples where other states experienced negative outcomes due to outdated systems or processes. Leaders often respond strongly to credible risk scenarios—especially when they can clearly see how modernization reduces the likelihood of similar issues in their own state.



5. Present a Phased Roadmap With Quick Wins and Long-Term Goals

Modernization doesn't have to be an all-or-nothing decision.

- ✓ Outline a multi-phase approach that spreads cost and implementation effort.
- ✓ Identify “quick wins” that can be delivered early to build trust and momentum.
- ✓ Show how each phase contributes to a stable, secure, and future-ready system.
- ✓ Emphasize predictability, transparency, and manageable change.



6. Offer Budget-Level Options to Help Leaders Move Forward

Flexibility is key.

- ✓ Prepare **Good / Better / Best** cost pathways with corresponding scope.
- ✓ Include total cost of ownership, staffing needs, and ongoing maintenance costs.
- ✓ Make tradeoffs clear so leaders can choose the option that aligns with current funding cycles or legislative priorities.



7. Anticipate — and Answer — Common Objections Up Front

Removing hesitation is half the battle.

Common leadership questions include:

- ✓ “*Isn't this too expensive?*” → Show ROI, long-term savings, and reduced risk exposure.
- ✓ “*Do we have funding for this? How will it be funded?*” → Clarify funding sources, budget cycle alignment, and what resources are required from the agency.
- ✓ “*Will this create disruption or change fatigue?*” → Highlight phased approaches and support resources.
- ✓ “*What is the timeline or timeframe?*” → Provide a phased schedule and note impacts on internal resources and shared stakeholders.
- ✓ “*Is it secure?*” → Outline security improvements, compliance benefits, and audit readiness.
- ✓ “*Do other states use this approach?*” → Bring forward peer examples and best practices.

Bottom Line for Leaders

Modernization increases security, reduces operational strain, improves customer experience, and strengthens public health data — all while supporting agency-wide priorities. A well-framed business case makes it easier for leadership to commit, fund, and champion the path forward.



**For more information, please
contact 1-800-869-0751**

