



# **Customer Experience Procurement Project (CXPP)**

## **Project Status Update and Report-Out**

VICKI COATES, Deputy Executive Director

KARI MILLER, Chief Financial Officer

MICHAEL PIANTANIDA, Senior Director of IT

Board of Directors Meeting, July 11, 2019

# Procurement Strategy and Status

	RFR Issued	Vote	Vendor Selected	Notes
Enrollment and Premium Billing (EPB)	October 23, 2018	April 11, 2019	Softheon	Includes member portal and noticing implementation and ongoing operations.
Contact Center Operations Services	March 12, 2019	Scheduled for August 19, 2019	On or around July 18.	
Technology Vendor	January 30, 2019	RFR Terminated on May 2, 2019		RFR terminated since member portal awarded to Softheon and decision to use contact center CRM.
HIX and Miscellaneous Notices	November 27, 2018	RFR Terminated on May 2, 2019		RFR terminated since notices were awarded to Softheon.

# EPB (Softheon) Vendor Implementation Status

## Implementation kick off held on May 1, 2019

- Activities over first 6 weeks
  - Business Requirements Document (BRD) developed and vetted
  - Initial project plan developed
  - Governance structure established
    - *Bi-weekly Executive Leadership*
    - *Weekly Core Team Meetings*
  - Risks, Actions, Issues and Decisions (RAID) register established

## First milestone of June 19, 2019 was met

- Business Requirements Document finalized
- Implementation Project Plan baselined
- Communication and Resource Management Plan created
- RAID accepted

# EPB Implementation: Looking Ahead

## Carrier EDI companion guides

- Initial round completed with Carriers by July 12, 2019
- These guides will be used as the basis for configuration and testing with our carrier partners

## HIX and NTT discussions underway

- HIX topics include understanding the current integration specifications
- NTT topics include understanding the current data file layout and what data will be needed in what format for data conversion

## Member portal business requirements document

- The teams are working to ensure all requirements are understood so that a document can be finalized by July 19, 2019

## Functional specification documents (FSD) for EPB and member portal

- After Business Requirements the functional specifications need to be written by Softheon
- The goal is to have the FSDs developed and reviewed by August 23, 2019

# Contact Center Procurement: Status

**The procurement is still active and under internal evaluation by the Strategic Scoring Team (SST) in preparation for a presentation to the Health Connector Board of Directors scheduled for August 19 of an Apparent Successful Bidder (ASB).**

- 6 bidders submitted proposals on April 19, 2019
- Oral Presentations were held May 30 – June 6
  - After orals, the Health Connector concluded there was:
    1. Less risk and cost to utilize the vendor's CRM rather than a Health Connector Salesforce instance and
    2. In addition, Softheon's bid included a solution for a member portal
  - Therefore, as a result, the Tech Vendor RFI was terminated
- Site Visits were conducted between June 17- June 28
- Reference calls are underway this week
- Recommendation to the Executive Director of an Apparent Successful Bidder –
  - On track for (on or about) July 18

# Contact Center Procurement: Themes

The procurement is still active and under internal evaluation by the Strategic Scoring Team (SST) in preparation for a presentation to the Health Connector Board of Directors scheduled for August 19 of an Apparent Successful Bidder (ASB).

## Key differentiators between bidding entities:

- Overall ability to meet business requirements with little or no customization
- Quality of written responses
- Adherence to Terms & Conditions, Model Contract Language and Service Level Agreements (SLAs)
- Organization and clarity of Oral Presentations
- Omni channel capabilities (Calls, chat, email, self service via IVR)
- Robust technology suite including CRM
- Existing sites with proven ability to flex up and down to meet business cycles
- Leadership Team experience
- Implementation experience, plan and approach
- Overall Business Value which includes Implementation Cost and Total Cost of Ownership

# Contact Center Procurement: Optional Services

**Several options are still being explored for the provision of optional services.**

## **Customer Interaction Services (Walk-In Centers)**

- The plan is to award to the ASB for the Contact Center with a provision to be able to transition, at some future date, to a community non-profit partner if a mutually agreeable arrangement can be reached

## **Mailroom**

- The options under consideration are to either:
  - (1) award to a sister agency and manage via an interagency agreement or
  - (2) award to the Contact Center vendor
- Operational improvements, Price and SLA compliance are factors driving this decision

## **Health Connector for Business Call Center**

- The options under consideration are to either:
  - (1) award to the Contact Center vendor with a future implementation date post June 2020
  - (2) maintain status quo
- Price and SLA compliance are factors driving this decision

# CXPP Administrative Budget Implications

**The Health Connector's administrative budget reflects what we know today about CXPP from both an implementation and ongoing cost perspective.**

- Total implementation costs for CXPP are currently estimated at ~\$22M through FY21
  - Estimate is based on information as of today and reflective of contracts for E&B and member portal and contact center bidder responses
- Relative to ongoing costs, new services and vendors under CXPP are expected to be less than our FY19 expense under our current contract even after factoring in estimated membership increases
  - We anticipate reflecting operational savings for E&B and contact center services for our nongroup population in our FY21 administrative budget recommendation



# CXPP Implementation – June 2019 – June 2020

