Customer Experience Procurement Project (CXPP)

Project Status Update and Report-Out

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Board of Directors Meeting, July 11, 2019
## Procurement Strategy and Status

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

Implementation kick off held on May 1, 2019

• Activities over first 6 weeks
  o Business Requirements Document (BRD) developed and vetted
  o Initial project plan developed
  o Governance structure established
    • Bi-weekly Executive Leadership
    • Weekly Core Team Meetings
  o 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 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