

Connect for Health Colorado 2014 Operational Plan

January 15, 2014

Mission and Objectives of 2014 Operational Plan

- 12-month work plan to prepare for the upcoming 2015 open enrollment cycle
- Links short term strategic goals with new initiatives and changes that span across people, process and technology
- Written to align with mission in Senate Bill 11-200 to increase access, affordability and choice for individuals and small employers purchasing health insurance in Colorado

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Review Process

- January 15: Overview presented to the Board Operations Committee
- January 22: Operations Committee feedback due
- January 27: Board of Directors review and approval
- January 30: Review of plan by the Legislative Health Benefit Exchange Implementation Review Committee

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Budget/Sustainability: Highlights

- Review of Financial Plan as presented to the Legislative Implementation Review Committee in September of 2013
  - Administrative fees
  - Transfer of CoverColorado reserves in 2013 and 2015
  - Carrier premium tax donations
  - Broad market assessment
  - Other potential revenue: grants, ancillary products

- Provides updated enrollment/financial sustainability models as presented to the Board of Directors on January 13, 2014

Sales Plan: Highlights

- Refine change/renewal process and related system functions
- Study and adopt industry best practices in sales both in other Marketplaces and across the industry
- Develop a comprehensive product strategy (with Board guidance)
- Explore feasibility and efficacy of Application Programming Interfaces (API)
- Develop a large market (employers <100) approach

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Sales Plan: By Channel

Agents/Brokers

- Establishment of onsite relationship managers
- Continued development of broker/agent toolkits
- Formalize lead generation system
- Create coverage retention campaigns
- Engage national web-based agents
- Leverage partnership with MGAs

Assistance Sites/Health Coverage Guides

- Enrollment/sales planning and training
- Focus on best practices and collaboration
- Outreach and grassroots activities to promote enrollment readiness among colleagues
- Updated training to include products, collaboration models, expediting the financial application process, best practices for managing caseload and reaching hard-to-reach communities

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Sales Plan: By Channel (cont.)

Customer Service Center

- Targeting training to enhance sales techniques
- Targeted outbound campaigns to drive enrollments
- Targeted outbound campaigns to drive service and retention (e.g. use of coverage, continuity of access etc.)
- Scalable sales force

Carrier-based Designated Sales Representatives

- Sales support including enhanced proposal functionality, tools for quoting and managing books of business, sales goals and performance measurements
- Co-branded sales and marketing materials
- Product training across channels

Sales Plan: By Channel (cont.)

Self Service

- Focus on changes to ensure ease of doing business with website
- Convene user focus groups to inform release planning
- Use web analytics to identify functionality and processes that are barriers to ease of use
- Elicit customer and peer testimonials on website to use as effective sales tools for direct purchasers
- Enable additional training including new resources such as quick connects and wizards

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Customer Service Strategy and Operations Efficiency

- Conduct Analysis Focusing on People, Processes and Technology
  - Customer satisfaction surveys
  - User groups
  - Formal evaluations including service center quality assurance
  - Business process forecast model outputs
  - Evaluating data including efficiency and user experience metrics
- Business Process Improvement
  - Focus on service center call handling efficiency, first call resolution and enhanced training
- People Management
  - Identify high performers in the service center and create strong career pathways
  - Identify strategy to provide expansion service center capacity for next open enrollment period
  - Ongoing resource assessments as enabled through 6-week and 90-day forecasts

Customer Service Strategy and Operations Efficiency (cont.)

- Technology Improvements
  - Single streamline application and shared eligibility service
  - Improve functionality and usability in specific areas (e.g., broker tools, service center technology, reporting, noticing)
  - Increase automation in specific areas to reduce operational load

- Training and Performance Management
  - Sales training support across all channels
  - Retention strategies across all channels
  - Focus on using existing technology to improve overall performance (e.g., CRM and business process management)
  - Just-in-time support in service center
  - In-field training support
  - Increased focus on streamlining training and content delivery for next open enrollment cycle

Office of Conflict Resolution and Appeals

- Appeal Volume Stabilization
  - Focus on education and outreach

- Operational Efficiency
  - Improve integration between the Marketplace and appeals management software eliminating multiple points of entry
  - Improve integration of case management and content management systems
  - Improve intake process
  - Improve workflow management

Communications, Outreach and Marketing

- Strengthen brand and support enrollments/customer relations
- Collect and analyze data to inform strategic direction for next open enrollment period
- Strong grassroots outreach and community-level partnerships with clear and effective communication
- Utilize CRM to its more full potential to drive marketing and outreach initiatives
- Paid media tactics
- Earned media tactics
- Social media tactics
- Collateral materials
- Grassroots outreach
- Stakeholder partnerships

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Applications and Technology Infrastructure

- Improved Functionality and Usability
  - Improve interoperability with state systems
  - Make the system simpler, easier to navigate and more intuitive for self-service users, agents / brokers and other sales channels
  - Provide service representatives with tools that improve their ability to serve customers
  - Provide tools to assist all sales channels in managing their clients throughout the lifecycle
  - Continual adjustments and improvements to shopping, payment, enrollment, renewal and redetermination and life change event functions

- Increased Automation
  - Focus on electronic data transfer, financial management and invoicing, metrics and reporting, web analytics, call center work flows, regression testing and software deployments

- Reduce Operational and Maintenance Costs
  - Reduce the amount of custom code utilized and the number of commercial off the shelf (COTS) systems with which the Marketplace needs to integrate
  - Improve technology processes
  - Continued migration to a scalable and flexible infrastructure

- Maintain Technology Currency
  - Increase use of social media and mobile applications, support for all commonly used operating systems and continual improvements to security and infrastructure components

Human Resources and Administration

- In 2014, begin to focus on rolling off contractual staff with a plan for transition
  - Knowledge transfer
  - Key hiring for permanent positions
  - Efforts to maximize retention of long-term staff with a focus on continuity and institutional knowledge
  - New resources will add skills and knowledge to ensure upcoming initiatives are successful
  - Update policies and procedures to align with current state
  - Grow staff training opportunities
  - Ensure ongoing adherence to policies related to finance, security and privacy, audit and general compliance