



*IS Strategic Plan – Q2 2014*

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*Board presentation – 6/9/14*

# High Level 3 year roadmap

## 2016 – FINALLY “REACH THE SUMMIT”

Business as usual technology operations. Predictable ‘run’ environment with ability to deliver on new project requests efficiently.

- All ITIL processes fully deployed
- Continuous improvement program in place
- Metric driven IT organization
- Predictable IT cost base
- Self service business reporting
- Full sourcing strategy benefits realization

## 2015 – THEN “STABILIZE”

Implement the ‘run’ strategy. Stabilize the technology in production and reduce overall technology spend in line with sustainability targets. Moving to a variable IT cost where possible.

- ITIL implemented
- Architecture enhancements deployed
- Key contracts renegotiated, sourcing re-balanced
- Operational cost base established with variability where possible
- API implemented
- Consulting support significantly reduced

## 2014 – FIRST “BUILD”

Complete the implementation of the marketplace and eligibility system builds as planned. Develop ‘run’ strategy.

- 1.x marketplace functionality deployed
- Release 2.0 marketplace functionality deployed
- Shared Eligibility System deployed
- IT strategy developed
- Sourcing strategy / new SLAs documented
- C4 IT Team fully resourced
- Architecture review
- Capacity planning

Base  
Camp  
Start

# Transition from 'build' to 'run'

## Systems

- Enhancing the Agent, SHOP and Individual Marketplace portals to incorporate new features and modify based on lessons learned from V1.0
- Implementing enhancements to increase self-service capabilities for account and enrollment changes
- Increasing the capabilities of the Service Portal to enable customer reps to address more customer requests in real-time
- Supporting customer retention and acquisition initiatives through greater automation around self-serve and advanced reporting / analytic technologies
- Enhance integration of mobile app with the overall Marketplace
- Implementing a single on-line (medical) application for financial assistance and single rules engine for determining eligibility

# Transition from 'build' to 'run' ...

## Technology

- Capacity planning initiatives for:
  - Marketplace technology and downstream / upstream state and federal systems
  - Service center IT and communications
- Continuously increasing the level of automation in the Marketplace release, deployment and testing processes
- Implementing APIs to enable web brokers and TPAs to leverage Marketplace technology and brand
- Utilize state systems for connectivity to the federal data hub
- Fully utilize cloud based compute on demand model
- Architecture enhancements to improve stability and reduce the effort of maintenance

# Transition from 'build' to 'run' ...

## People / process

- Implementing IT management best practices and processes (ITIL)
- Reducing reliance on consultants transitioning responsibilities to C4 FTEs

## Contracts

- Sourcing strategy to reduce cost and move to a variable model where possible. Looking at which functions to insource over time
  - IT Maintenance and Operations
  - Hosting
- Reviewing and re-working Marketplace technology and Service Center SLAs based on six months of operations

# Technology – Goals, Objectives, Operations

Goals	Objectives	Operations
Reduce technology, call center and operations spend in line with sustainability targets	<ul style="list-style-type: none"> <li>➤ Reduce OPEX and CAPEX</li> <li>➤ Greater variability</li> <li>➤ More self server</li> <li>➤ IT governance</li> <li>➤ Rebalanced sourcing contracts</li> <li>➤ Transparent vendor pricing</li> </ul>	<ul style="list-style-type: none"> <li>➤ Renegotiate key contracts</li> <li>➤ Implement cloud compute</li> <li>➤ Implement account and enrollment change functionality – SHOP and Ind.</li> <li>➤ TCCB and BCCB change boards</li> <li>➤ Restructure M&amp;O support contract</li> <li>➤ Improve billing automation</li> </ul>
Stabilize the technology platform	<ul style="list-style-type: none"> <li>➤ Tighter SLAs</li> <li>➤ Increase MTBF reduce MTTR</li> <li>➤ Greater release process automation</li> <li>➤ Better change control</li> <li>➤ More extensible architecture</li> </ul>	<ul style="list-style-type: none"> <li>➤ Capacity planning</li> <li>➤ Vendor management scorecard</li> <li>➤ SLA renegotiation</li> <li>➤ TCCB change board</li> <li>➤ Architecture review</li> </ul>
Make it easier for citizens to use our services, enroll and remain as long-term C4 customers	<ul style="list-style-type: none"> <li>➤ Remove roadblocks for customers</li> <li>➤ Achieve shared eligibility with the state</li> <li>➤ Greater ease of use</li> <li>➤ Enable renewals and redeterminations</li> <li>➤ Increase partner adoption - brokers, HCG etc.</li> <li>➤ Utilize information better for channel decision making</li> </ul>	<ul style="list-style-type: none"> <li>➤ Shared Eligibility System                             <ul style="list-style-type: none"> <li>➤ Individual, SHOP, agent, HCG</li> </ul> </li> <li>➤ Marketplace Release 2.0</li> <li>➤ Implement renewals and redeterminations</li> <li>➤ End of year tax statements for individuals</li> <li>➤ Build out BI semantic layer</li> </ul>
Protect the security of our information and infrastructure	<ul style="list-style-type: none"> <li>➤ Fully implement all Plan of Action Items</li> <li>➤ Continue to minimize vulnerabilities</li> </ul>	<ul style="list-style-type: none"> <li>➤ Plan of action deployment</li> <li>➤ Bi-annual risk and vulnerability assessments</li> </ul>
Build a high performing technology group	<ul style="list-style-type: none"> <li>➤ Grow internal IT team</li> <li>➤ Retain IT team</li> <li>➤ Allow team members to reach their career goals</li> </ul>	<ul style="list-style-type: none"> <li>➤ Ongoing recruitment</li> <li>➤ 360 degree performance management</li> <li>➤ Coaching &amp; development</li> </ul>

# Priority Areas

- Architecture Review
- Capacity Management
- Vendor Management
- SLA Management
- Release Management
- Change Management
- Maintenance and Outage Management

# Business Intelligence– Goals, Objectives, Operations

Goals	Objectives	Operations
Mature reporting capabilities to improve the timeliness, accuracy and richness of information delivery	<ul style="list-style-type: none"> <li>➤ Introduce Greater Usability</li> <li>➤ Increase Accuracy</li> <li>➤ Decrease turn-around times</li> <li>➤ Enhance Security Architecture</li> </ul>	<ul style="list-style-type: none"> <li>➤ Revise, update, and automate existing data requests</li> <li>➤ Prove and/or correct data accuracy</li> <li>➤ Build out the Data Mart &amp; Semantic Layer</li> </ul>
Build out Data Governance Structure to protect our data and improve quality	<ul style="list-style-type: none"> <li>➤ Data Terms &amp; Definitions</li> <li>➤ Standards &amp; Guidelines</li> <li>➤ Data Usage &amp; Approvals</li> <li>➤ Data Request Process</li> </ul>	<ul style="list-style-type: none"> <li>➤ Engage business owners</li> <li>➤ Publish agreed upon terms</li> <li>➤ Develop New Request process, approvals, &amp; usage</li> </ul>
Build out BI SDLC process to ensure repeatability and improve quality	<ul style="list-style-type: none"> <li>➤ Development Standards</li> <li>➤ End to End Testing</li> <li>➤ Migration/Go Live Approvals</li> </ul>	<ul style="list-style-type: none"> <li>➤ Initiate testing by the testing team, including test cases &amp; documentation</li> <li>➤ Attend BCCB &amp; TCCB for BI related changes</li> </ul>
Maintain Operational Readiness	<ul style="list-style-type: none"> <li>➤ Monitor System &amp; Load performance</li> <li>➤ Monitor Data Quality</li> </ul>	<ul style="list-style-type: none"> <li>➤ Build out Audit, Balance, &amp; Control reports &amp; alerts</li> <li>➤ Investigate rejected records to move towards more complete data</li> </ul>
Build new reports to meet growing business needs	<ul style="list-style-type: none"> <li>➤ Webpage Activity Analytics</li> <li>➤ Mapping enrollments</li> <li>➤ Renewals, Year over Year, Life Changes</li> </ul>	<ul style="list-style-type: none"> <li>➤ Increased involvement with upcoming releases</li> <li>➤ Google Maps POC</li> </ul>



# Business Intelligence and Data Warehouse

- Complete BI maturity study to document long term vision
- Continue to build out exchange datamarts:
  - hCentive
  - OCX (CRM)
  - Financial Management
  - CBMS
  - ACD (Automatic Call Distribution)
- Ongoing process improvement
  - Data dictionary
  - Formal QA processes for BI
  - Formal release processes for BI
  - Data governance
- Implement advanced analytics
  - Web analytics (google analytics)
  - Self service reporting and analytics (COGNOS + dashboard)
  - Geospatial, Aggregate provider / claims data POC

# Security – Goals, Objectives, Operations

Goals	Objectives	Operations
Mature the governance program	<ul style="list-style-type: none"> <li>➤ Strategy and planning</li> <li>➤ Compliance</li> <li>➤ Policy, standards, processes, guidelines</li> <li>➤ Develop PSO training plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ Revise, update, and adjust Privacy and Security Program in response to new release of the marketplace</li> <li>➤ Quarterly steering committee meetings (COO, CFO, CTO, PSO)</li> </ul>
Mature risk management program	<ul style="list-style-type: none"> <li>➤ Risk Management</li> </ul>	<ul style="list-style-type: none"> <li>➤ Engage business owners</li> <li>➤ Improved integration with vendors</li> </ul>
Protect information and assets	<ul style="list-style-type: none"> <li>➤ Asset mgmt.</li> <li>➤ Data classification</li> <li>➤ Identity and access mgmt.</li> <li>➤ Human Resource Security</li> <li>➤ Operations mgmt.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Focus on call center technical and physical security practices</li> <li>➤ Initiate and complete rollout of already approved Privacy and Security Policies</li> <li>➤ Finalize remaining plan of action items</li> </ul>
Maintain operational readiness	<ul style="list-style-type: none"> <li>➤ Activity mgmt.</li> <li>➤ Proactive testing</li> </ul>	<ul style="list-style-type: none"> <li>➤ Institute privacy and security health checks</li> <li>➤ Self assessments</li> </ul>
Empower the workforce	<ul style="list-style-type: none"> <li>➤ Awareness and training</li> <li>➤ Remove bottlenecks</li> </ul>	<ul style="list-style-type: none"> <li>➤ Increased frequency of training</li> <li>➤ Process development and rollout</li> </ul>