Contact Center Services Implementation and Operational Contracts

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Board of Directors Meeting, July 8, 2021

Agenda

1. Background Information

2. Overview of the Proposed Contact Center Contracts: Scope, Timing and Technology

3. Review of Budget: Implementation and Ongoing Operations

4. Overall Terms and Milestones

5. Board Vote to Proceed

Implementing Improvements to the Health Connector's Contact Center Member Experience

To ensure that Health Connector members receive the best customer service experience possible, the Health Connector is actively working to implement improvements to its contact center and back office/document processing capabilities

- As described in the June presentation to this Board, the Health Connector has engaged Accenture State Health Care Services, LLC, to perform planning and design work for necessary activities, technologies, and services to improve the Health Connector's contact center member experience
  - As a reminder, this work is a continuation of the Customer Experience Project (CXP), launched in 2019

- As CXP work continues, the Health Connector remains committed to ensuring that members receive efficient and accurate assistance when contacting us, in addition to ensuring that documents are processed timely and correctly

- The Health Connector is therefore looking to move forward with implementation of the contact center and back office/document processing improvements proposed by Accenture, based on its response to the Health Connector's May emergency procurement and subsequent planning and design work

- Accenture is proposing to provide new contact center and back office services, including:
  - A new customer relationship management solution and related technology
  - Staffing, including agents, back office workers, and operations and maintenance support
  - Management and other process supports

- Current contact center services will transition to Accenture through the summer, with full transfer targeted for October 2021

Qualities and Experience that Accenture Brings to the Health Connector and its Members

The Health Connector believes Accenture brings qualities that will provide our members with the best possible customer service experience, including:

- Strong accountability to Massachusetts account performance through organizational structure

- Advanced skillsets and tools to drive quality improvement and data-driven decisions

Additionally, Accenture has proven to be a strong partner for the Health Connector, as experienced with:

- **Contact Center Management Support:** In September of 2020, the Health Connector entered a management consulting contract for staff augmentation support for Health Connector operations staff in response to an increased need for modeling and management expertise in the following areas: workforce management, quality assurance, customer satisfaction analysis program, inventory management, and process mapping. Accenture has delivered the models requested and their expertise has allowed Health Connector staff to focus on other critical elements of the program.

- **Contact Center Surge Staffing:** In October, 2020, the Health Connector entered into an agreement with Accenture to supplement contact center staffing to ensure ample headcount to meet the projected forecast for Open Enrollment 2021. Accenture trained their staff and deployed their IVR in time for staff to answer phones within 5 weeks. The CSAT scores for the Accenture agents was consistently above the 90% target.

Overall Scope and Services at Go-Live (October 2021)

The Massachusetts Health Connector is proposing to contract with Accenture to provide the following services:

- Assisting members and Assisters in answering their questions regards eligibility, plan selection, enrollment, billing, payment, how to report a change, and general program inquiries

- Handle all calls in both English and Spanish, and provide translator services for multiple other languages

- Processing documents submitted by members to meet identity proofing requirements and program eligibility

- Outreach and coordination with third party vendors and carrier partners to manage cases and meet turnaround times required for timely access to coverage

- Provide support for members who have immediate medical needs or other issues requiring coordination with the Health Connector Ombudsman Team

- Provide quality assurance and customer satisfaction programs to identify opportunities to improve the customer experience

- Provide workforce management program to forecast and manage call and case activity

As part of the initiative, the Health Connector will be taking over via assignment the leases on two Customer Interaction Center (CIC) leases, also known as our walk-in centers

- 133 Portland Street, Boston, owned by Portland North LLC, for approximately $208,000/year

- 146 Main Street, Worcester, owned by Israel Family Limited Partnership, for approximately $67,000/year

Technology Supporting the Service Model

The Health Connector will acquire the following technology services and licenses, which Accenture will operate on our behalf. This arrangement positions the Health Connector with the opportunity to be shielded from member disruption, associated costs and complexities of data migration when determining scope in future procurements.

The Health Connector will have post-contract license rights to the:

- Interactive Voice Response and Telephony platform
- Customer Relationship Management platform
- Contact Center Reporting platform

In order to procure these cloud services and licenses, the Health Connector will work through vendors currently on state blanket contracts. Specifically, the Health Connector would contract through:

- Smartronix, leveraging EOTSS RFR 16-21 Master Blanket PO 7798

  - Licenses for Amazon Web Services

- Carahsoft, leveraging State Blanket ITS60

  - Licenses for Safesforce, Mulesfot, Tableau, Informatica, Copado, Nextalk, Twilio, and Cyara

Additional Features Available to Health Connector Members Following Initial Go-Live

There are tight timeframes to manage to achieve foundational supports by Open Enrollment 2022.   But planned for "Day 2" release (late winter/spring) are more advanced capabilities:

Additional Call Quality Monitoring

- Speech analytics which will allow us to understand the sentiment and trends of customer interactions to drive continuous improvements to the customer experience

IVR Self-Service

- Natural language recognition
- Scheduled call-back option

Improved Call Routing

- Skill based routing for members calling about complex issues (*e.g.,* retro enrollment, non-HIX dental, premium billing) to be routed to directly to agents who have more experience and training in that area

Additional Member Communication and Support Channels

- Email
- Chat
- Text (SMS)

Budget Overview

- The recommended contracts reflect <u>$10.4M in implementation costs</u> and an estimated $25.7M through June 2022 for ongoing operations

- Exclusive of implementation, <u>ongoing operations over the ~4-year term is estimated to be ~$117M</u> inclusive of cloud services, software licenses, and CIC lease costs

- Smartronix and Carahsoft are reflected in Third Party Technology and for FY22 are estimated at $0.8M and $1.6M, respectively

- Therefore, the aggregate value of contracts and leases recommended is ~$127M, when including the implementation expenses

	Implementation	FY22*	FY23	FY24	FY25	FY26**
Contact Center	$10.2	$19.4	$23.8	$22.9	$22.3	$2.1
Contact Center Passthrough		$0.8	$0.8	$0.8	$0.8	$0.1
Third Party Technology	$0.2	$2.7	$2.7	$2.7	$2.7	$0.3
CIC		$2.1	$2.2	$2.2	$2.2	$0.2
Work Orders		$0.8	$0.8	$0.8	$0.8	$0.1
Subtotal	**$10.4**	**$25.7**	**$30.2**	**$29.3**	**$28.7**	**$2.7**
Letter of Agreement Approved June 10, 2021	**-$3.4**					
Total	**$7.0**	**$25.7**	**$30.2**	**$29.3**	**$28.7**	**$2.7**

FY22 reflects 9 months of ongoing operations (Oct21-Jun22)
***FY26 reflects ~5 weeks of operations (through Aug. 8, 2025)*

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Timeline and Terms

Key Dates

- Go-live of foundational features and functionality: Planned for October 1, 2021

Milestones

- There are four Milestones with associated payments for Release 1 implementation.

Milestone Description	Date	Payment
10/1/21 Go-live System Design (Data model, CRM, IVR, System Solution)	7/16/21	$400,000
Workforce Management and Training Planning	8/20/21	$200,000
Staff Hiring and Training - Completed	9/30/21	$200,000
Full System	10/1/21	$200,000

Service Level Agreements (SLAS)

- The contract has a set of SLAs covering incident management, call center performance, case management performance, escalations, CSAT scores and overall staffing levels

Terms

- Contract term extends through August 8, 2025, with no options for renewal or extension

Board Votes

Vote 1: Accenture: Health Connector staff recommend that the Board vote to allow the Health Connector to execute an agreement with Accenture, as described in this presentation, bringing the total costs for the Accenture contract to $10.2 million for implementation services and approximately $95 million for operational services through August 8, 2025

Vote 2: Smartronix: Health Connector staff recommend that the Board vote to allow the Health Connector to engage Smartronix to provide technology services as described in this presentation under the Health Connector's Account Agreement with Smartronix, with an estimated annual cost of $831,430

Vote 3: Carahsoft: Health Connector staff recommend that the Board vote to allow the Health Connector to execute a purchase order with Carahsoft for technology services as described in this presentation, with an estimated annual cost of $1,633,131

Vote 4: CIC Leases: Health Connector staff recommend that the Board vote to allow the Health Connector to execute an assignment of the CIC leases with Portland North LLC and Israel Family Limited Partnership, as described in this presentation, with an estimated annual cost of $208,000 and $67,000, respectively