



Contact Center and Support Services RFR Salesforce and AWS-Based Contact Center Solution RFQ (VOTE)

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Agenda

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Health Connector staff will review a Request for Responses (RFR) for Contact Center and Support Services and a Request for Quotes (RFQ) for a Salesforce and AWS-Based Contact Center Technology Solution.

- Member Experience: Current and Future State
- The Procurement Process
- Contact Center and Support Services
- Implementation and Risks
- Salesforce and AWS-Based Contact Center Solution
- Implementation and Risks
- Board Votes: Contact Center and Support Services Contract and Salesforce and AWS-Based Contact Center Solution Contract

Strategic Plan and Equity Orientation re: Contact Center and Support Services

2024-2028 Strategic Plan Alignment

Contact Center and Support Services supports the following of the strategic plan's key pillars:

- Improve and modernize at the applicant and enrollee experience
- Deliver high-value coverage options to residents of the Commonwealth
- Improve equitable access to affordable health insurance coverage
- Maintain and strengthen organizational structure and system reliability

These pillars are advanced by:

- Holding the contact center vendor to higher standards to ensure that they are providing exceptional and consistent contact center services for Health Connector members, Health Connector applicants, plans, relationship entities and other interested parties

Combating Inequity

Contact Center and Support Services supports the centering of equity in the following ways:

Adopting a customer-first culture by creating tailored interactions that provide more nuanced support to diverse public

- ✓ *Knowing the customer base and providing access to services in multiple languages and in ways that are more meaningful*
- ✓ *Focusing on first call resolution, minimizing administrative burdens that complicate coverage issues for historically underserved populations*
- ✓ *Requesting feedback from customers to improve service so we can tailor our experience to their unique needs*

Creating technology solutions that make support services easier to navigate

- ✓ *Think outside the box and innovate to solve business challenges that result in a consistent customer experience for diverse populations*



Member Experience: Current and Future State

Current and Future State

Full scope of the Contact Center contract is currently held by Accenture State Health Care Services, Inc. (“Accenture”).

Current State

- Accenture was awarded an emergency contract to provide call center and supporting technology in 2019
- The current Accenture contract expires in August 2025 and no extensions are available
- Call center, back office, document processing and verification services are among the major components of the overall service delivery that Accenture provides to Health Connector members

Future State

- Contact center vendor that can support omni channel communication for customers
- Customer relationship management system that includes all customer touchpoints including outreach/communications and appeals
- Consistently best in class customer service
- Expert technology support to provide a seamless customer experience

Procurement Strategy

Based on the vision for the future state, Health Connector leadership decided to break the existing contract up into two distinct pieces: contact center and technology.

- The primary goal was to select vendors who shared the Health Connector's future state vision
- Select a contact center vendor that is an expert in running omni-channel contact centers for the front end, and a technology vendor that is an expert in providing contact center technology support on the back end
- Issue high-quality procurements that address gaps in current contracts and incorporate lessons learned
- Contract with vendors that will partner with the Health Connector and support our goal of consistent, best-in-class customer service
- Explore alternate payment structures on the contact center side

Contact Center: The Scope of the Request for Responses (RFR)

The RFR expressed the Health Connector's preference for a vendor that could perform the initial contact center and support services scope as well as additional contingent scope.

Contact center and support services scope:

- Contact center
- Back office
- Document processing and verification

Additional contingent scope:

- Health Connector for Business customer calls
- Salesforce Marketplace module
- Member appeals tracking

Contact Center: Preferred Vendor Qualities

The procurement team identified qualities sought in a contact center and support services vendor.

- Demonstrated focus on a customer-centric approach
- Demonstrated ability to provide an omni-channel model
- Proven utilization of industry-standard technologies and business best-practices that drive towards exceptional customer service for prospective and current Health Connector members
- Demonstrated ability to manage scope and risks, and implement on time and on budget
- Demonstrated processes and capabilities for continuous improvements to achieve high-member satisfaction
- Proven agility in ramping-up and training staff to meet service and quality standards during the Open Enrollment Period
- Experience delivering comparable services within a health care and/or State-based Marketplace setting

Technology: Scope of the Request for Quotes (RFQ)

The Health Connector sought a qualified vendor to provide technology services with the following capabilities through state blanket ITS81.

- Manage, monitor and maintain all items associated with an integrated contact center technology solution, inclusive of Amazon Connect for telephony and Salesforce for Customer Relationship Management (CRM)
- Ability to implement multiple releases to deliver system enhancements that meet business needs
- Ability to perform daily operations and maintenance support, inclusive of defect triage and resolution
- Ability to maintain dedicated connectivity to the Health Connector technology and the contact center technology

Technology: Preferred Vendor Qualities

The technology procurement team identified preferred qualities for a contact center technology vendor.

- Demonstrated experience in contact center technology
- Demonstrated ability to support Salesforce and an AWS-based contact center solution
- Proven utilization of industry-standard technologies and business best-practices
- Adherence to strict development and implementation timelines and provide continuous quality assurance and monitoring
- Provided a flexible and scalable operation as business needs evolve
- Demonstrated ability to integrate with existing systems, including:
 - The Health Connector's current enrollment and premium billing vendor
 - The contact center vendor identified through the RFR process



The Procurement Process

Initial Phase

Health Connector team conducted research prior to meeting to write the procurement documents.

- A Requests for Information (RFI) was issued on April 4, 2023 to test the market for best practices, operational and technical capabilities, and sustainable cost
- Interviews were held with other state agencies in the Commonwealth and other State-Based Marketplaces to understand their experience with different vendors, lessons learned, best practices and strategies
- Member survey data was reviewed to better understand customer expectations and experiences
 - Call center end-of-call satisfaction surveys
 - Health Connector annual member survey

Posting the Procurements

On April 9, 2024, the Health Connector released two separate procurements.

Contact Center and Support Services Request for Responses (RFR)

- Bidder to provide all contact center technology including workforce management, Tableau, Language Line, agent workstation equipment, conversational analytics tool, automation identification diagnosis tool, security tools and firewalls, QA technology

Salesforce and AWS-Based Contact Center Solution Request for Quotes (RFQ)

- Bidder to administer Health Connector technology including AWS, Amazon Connect, Salesforce, Twilio, Odaseva as well as provide all back-end technology to support the contract
- Leverage an existing state blanket contract to obtain a fixed-price agreement for IT professional services

Evaluation Approach

Scoring sheets were developed to evaluate bidder responses.

Bidders were scored on their response to each of the distinct sections of the RFR/RFQ:

- Business response
- Programmatic response
- Technology response (RFQ only)
- Cost response

The evaluation team scored business, programmatic, and technology responses first, assigned an overall score, and then reviewed cost responses

Evaluation of Proposals

There were two levels of scoring for each of the bids - individual and team.

- Individual team members read each bid and recorded their scores on business, programmatic, and technology responses
 - For each section of the response, team members recorded strengths and weaknesses of the response, added any individual comments, and gave an overall rating
- Team sessions were held with the purpose of arriving at a collective team score
 - Each team member discussed their list of strengths and weaknesses, any additional comments, and provided their overall score
 - Individual scores for each section were averaged to develop a final team score for that section
- Cost response was analyzed independently by the Health Connector's Finance team
 - The Finance team ensured that cost response calculations were consistent across all bidders
 - Cost responses were included in final overall score by evaluation team

Oral Presentations

Based on bidder scores, the evaluation team invited select bidders to give oral presentations.

- Bidders were asked to cover the following topics during their oral presentation:
 - Their proposed team
 - Their solution
 - Best value proposition
- In the second half of the meeting, bidders were asked to respond to direct questions from the Health Connector (bidders did not receive the questions ahead of time)
- Following oral presentations, the evaluation team reviewed their group scores and made any adjustments based on the information learned during oral presentations

Best and Final Offer (BAFO)

The evaluation team extended requests to both Bidders to submit best and final offers.

- Once the BAFOs were received and analyzed by the Health Connector Finance team, the evaluation team reviewed their group scores and made final adjustments based on the new pricing



Contact Center and Support Services

Responses

The Health Connector received six (6) responses to the procurement.

Bidder Name	Location
Automated Health Systems (AHS)	Pittsburgh, PA
Conduent State Healthcare, LLC	Florham Park, NJ
FH Cann and Associates, Inc.	North Andover, MA
Maximus US Services, Inc.	McLean, VA
SaviLinx, LLC	Brunswick, ME
TTEC Government Solutions, LLC	Greenwood Village, CO

Apparent Successful Bidder

The evaluation team chose Automated Health Systems, Inc. (AHS) as the apparent successful bidder.

- The evaluation team concluded that AHS could provide the best contact center member experience and best overall value to the Commonwealth
- They provided a comprehensive and innovative bid that clearly demonstrated their extensive knowledge of contact center services
- In their written proposal, during the oral presentation, and in responses to the Q&A portion of the presentation, AHS continued to demonstrate transparency and responsiveness to the Health Connector
- They submitted a competitive BAFO

Benefits to Members

AHS's strengths as contact center experts will help the Health Connector realize its future vision as a provider of best-in-class customer service.

- Fully understands the Health Connector's business, mission, and strategic direction related to omni-channel and improvements to member experience and customer satisfaction
- Maintains a respectable track record of being a strong partner for State-Based Marketplaces with proven experience implementing projects with comparable size, scope, and business requirements
- Experience and customer-first approach will allow the Health Connector to fulfill its goal of improving the customer experience and exceeding our members' expectations
- Qualified team with many years of direct contact center implementation and operational experience

What Sets AHS Apart

AHS's bid included factors that the Health Connector felt gave them an advantage over other Bidders.

- 45 years supporting Medicaid; 35 years running HHS contact centers; 18 years as a Medicaid broker; 8 years as the contact center vendor for Rhode Island marketplace
- Local presence with office in Marlborough, MA
- Preference to hire Massachusetts residents
- Ability to staff for Health Connector's top six languages
- In-house interpretation unit
- Tied their response to the Health Connector Strategic Plan
- Experience with IdeaCrew, the vendor that provides our HCB platform
- 100 percent employer paid health insurance for staff
- Incentives for agents with high customer satisfaction scores

Cost Responses

AHS's initial proposed cost was among the most competitively priced Bidders.

	Bidder 1	AHS	Bidder 3	Bidder 4	Bidder 5	Bidder 6
Total cost of contract	\$109.64M	\$109.91M	\$163.87M	\$180.65M	\$198.94M	\$226.32M

After the BAFO, AHS reduced their final cost proposal to \$100.1M

Contract and Price Overview

AHS's proposed cost structure is reflective of efficiencies and economies of scale.

- Implementation cost with payments tied to milestones
- A fixed cost per year for years 2 – 5 regardless of membership total

Year 1 Implementation	Year 2	Year 3	Year 4	Year 5	Total Years 2 – 5	Total Years 1 - 5
\$11.3M	\$23.1M	\$23.4M	\$26.7M	\$19.1M	\$89.3M	\$100.1M



Implementation and Risks

Implementation

The transition to AHS will involve many moving pieces but is far less complex than previous contact center transitions.

- Our current contact center and technology vendor, Accenture, will remain as such during the transition period thereby providing stability on both calls and all back-end technology services
- AHS will begin work 11 months before they fully assume all ownership of calls
- We will run parallel contact centers with our current vendor and gradually stagger the transition of calls (by type) to AHS over a 6-month time frame
- AHS is currently the contact center vendor for MassHealth, so already has experience with the MassHealth application process, using HIX and MyWorkSpace, and training staff in those systems

Implementation (Cont'd)

- There is no data conversion, as the Health Connector owns its own instance of Salesforce and AWS
- The Health Connector lead for the project has many years experience transitioning contact centers, including AHS's transition on the MassHealth account
- We have all of our contact center Standard Operating Procedures (SOPs) documented in detail
- We have formal Project Management (PM) support at both the Health Connector and AHS

Implementation Risks

Despite the smaller scope of this transition compared to past transitions, there is still some risk.

- Hiring for contact center representatives and support personnel may be challenging
- The technology vendor will have to support parallel contact centers
- Call transition may take longer than expected due to complexity of our work
- Due to the Health Connector's internal staff size, our pool of internal resources is small
- There are some dependencies on third parties for cooperation and project participation

Project Management and Risk Mitigation

The Health Connector has already started transition planning with our internal Program Management Office.

- The Master Services Agreement with AHS includes a joint governance structure
- Our internal Project Manager will work with all three parties (Health Connector, AHS, Accenture) to develop a joint project plan incorporating all aspects of transition up to full operations
 - This will include project artifacts: scope and planning documents, roles and responsibilities, risk register, requirements documents, project plans
 - Health Connector PM will ensure milestones are measured, documented and met
- We will evaluate the success of the project against its benchmark and share lessons learned and best practices



Salesforce and AWS-Based Contact Center Solution

Responses

The Health Connector received one (1) response to the procurement.

- Accenture LLP – based in Chicago, IL
 - This is the Health Connector’s incumbent vendor currently providing technology services for the contact center
- The bid included documentation that Accenture was notified by the Executive Department’s Operational Services Division that it was an apparent successful bidder on ITS81: Project Services and GIS

Apparent Successful Bidder

The evaluation team chose Accenture LLP as the apparent successful bidder.

- The evaluation team felt that Accenture LLP can provide the best overall value
- The current contact with Accenture was drafted under an emergency procurement and this RFQ allows the Health Connector to enter a new contract with revised terms through an open procurement process
- As the incumbent vendor, Accenture understands the technology support needed for Salesforce and the AWS-based contact center solution licensed by the Health Connector
 - This limits the Health Connector's risk during implementation due to already demonstrating proven experience with the Health Connector and its technology solution
 - This also maintains technology stability as the contact center and support services transitions operations to a new vendor

Contract and Price Overview

Accenture's proposed cost structure is a fixed price agreement per the request in the RFQ.

- Implementation cost with fixed monthly payments
- A fixed cost per year for years 2 – 3 regardless of membership total

Category	Year 1 Implementation	Year 2	Year 3	Total Year 2- 3	Total years 1 - 3
Labor and Staff	\$2.28M	\$5.49M	\$5.23M	\$10.72M	\$13.01M
Licensing*	\$468.1K	\$1.61M	\$1.47M	\$3.09M	\$3.56M
TOTAL	\$2.75M	\$7.10M	\$6.70M	\$13.81M	\$16.57M

** Since the Health Connector licenses much of the core Contact Center technology directly, those licenses costs will remain as part of licensing fees paid directly by the Health Connector and are not included in the cost from the Bidder*



Implementation and Risks

Implementation

Continuing with the incumbent vendor provides stability of core contact center technology services during the transition to AHS.

Implementation scope delivered through development and/or configuration includes:

- Integrating with the new Contact Center and Support Services vendor (AHS)
 - Ensuring access to contact center technology solutions through AHS agent issued equipment
 - Data reporting and integration to support workflow management
- Maintain dual contact center connectivity through the staggered transition approach
- Optional future enhancement considerations include:
 - Improved IVR Experience, including self service for Portuguese, Haitian Creole, Mandarin and Vietnamese
 - Scheduled customer call backs and outbound calls
 - Identification of callers based on attributes
 - Agent alerts in Salesforce CRM identifying members who are part of a campaign or service recovery

Implementation Risks

While the core technology support remains with the incumbent, minimizing transition risk, there is still some risk the Health Connector is carefully managing.

- Some key personnel in the new Accenture agreement are different from the current arrangement, requiring cross training
- The technology vendor must support to parallel contact centers and introduce new integrations
- The technology vendor must develop, test and deploy enhancements to the existing platform in parallel to the transition of contact center agents
- Due to the Health Connector's size, our pool of resources is small
- There are dependencies on third parties for cooperation and project participation



Board Vote

Vote

The Health Connector requests Board of Directors approval to enter into an Agreement with Automated Health Systems, Inc. for the following:

Services:

- Contact center
- Back office
- Document processing and verification

Service Term:

- September 15, 2024 to June 30, 2029
- May be extended in any increment through June 30, 2034

Total cost:

- Not to exceed \$100.1M

Vote

The Health Connector requests Board of Directors approval to enter into an Agreement with Accenture LLP for the following:

Services:

- AWS
- Amazon Connect
- Salesforce
- Twilio
- Odaseva
- All back end technology to support the contract

Service Term:

- October 1, 2024 to June 30, 2027
- May be extended in any increment through June 30, 2032

Total cost:

- Not to exceed \$16.57M



Appendix

Evaluation Approach

Business response

- Followed submission instructions
- Format requirements
- Cover letter included all requirements
- Organizational overview
- Subcontractor requirements
- Interests
- Bidder's financial condition*
- Conflicts of interest
- Security policies and procedures
- Disclosure of litigation
- Disclosure of third parties assisting with preparation of response
- Required forms and certifications

**The Health Connector did not need to independently evaluate the financial condition of Bidders for the RFQ since they were required to be Commonwealth approved through state blanket ITS81*

Evaluation Approach

Programmatic response

- Bidder experience with State Based Exchanges and similar organizations
- References
- Approach narrative
- Implementation strategy and project plan
- Bidder's organization
- Subcontracting
- Detailed response questions
- Quality assurance
- Relevant customer service experience
- Performance and service level agreements
- Transition approach
- Other services provided to customers
- Vendor terms
- Risk management plan

Evaluation Approach

Programmatic response

RFR only

- Staffing and forecasting approach
- Customer experience
- Use of data and reporting

RFQ only

- System interoperability
- Relevant contact center support experience
- Technology response

Evaluation Approach

Technology Response

- Implementation approach and experience
- Implementation components and application changes
- Requirements traceability
- Trainings and certifications
- Change, issue and defect management
- Methodology for automation vs. business process
- Stakeholder engagement
- Approach and readiness to support contact center and support services vendor
- Integrations approach and support
- Previous implementation experience
- Experience with an integrated contact center technology solution inclusive of Amazon Connect for Telephony and Salesforce for Customer Relationship Management (CRM)

Evaluation Approach

Cost response

- Transition and implementation cost for year 1
- Ongoing operations costs for year 2 through end of contract

For overall value, the team considered:

- Industry expertise
- Core philosophies
- Service quality
- Customer service
- Culture
- Infrastructure
- Management experience
- Customer satisfaction
- Reporting
- Analytic capabilities
- Flexibility
- Training and development
- Quality assurance
- Competitive pricing
- Cost structure
- Capacity and scalability