

# Service Center Transition Project

- Call Center Products and Services for State-Based Marketplace RFP closed out Mid- August
- Vendor selected: Faneuil
  - Experience with 4 other State-Based Exchange
    1. Washington
    2. California
    3. Connecticut
    4. Minnesota
- Replacement of Service Center Agents and tools
  - Telecommunication System: Cisco 11 Unified (UCCE)
  - Oracle Service Cloud (OSvC) CRM
  - Trajectory – Faneuil’s Digital Innovation Platform

# Service Center Vendor Replacement Project Charter

## Project Definition

Connect for Health Colorado desires to improve the quality of the user experience for customers and partners and increase efficiency and cost effectiveness through improved program integrity and data availability. To support this objective, C4HCO is procuring a highly configurable Telecommunication System, CRM and Ticketing Application to improve agent productivity and customer satisfaction. Both solutions must be a state-of-the-art system program with add-ons for flexible service and mobile friendly.

## Scope and Schedule

**In scope:** Outsourcing of Call Center Operations and technology (Telecommunications system and CRM/Ticketing system).

**Out of scope:** CBMS connectivity/integration

**Constraints:** Following federal guidelines for vendor selection

**Dependencies:** Authority to Connect approval from CMS

### Baseline Project Schedule:

Vendor Selected	8/13/2019
Project Kick Off	8/30/2019
Plan	10/30/2019
Execute	2/24/2020
Close	4/27/2020

## Team and Key Stakeholders

**Executive Sponsors:** Kelly Guthner, Brian Braun, Alan Schmitz

**Steering Committee:** Kelly Davies, Ian McMahon, Justin Brandon, Dave Coren, Nyle Boyd

**Project Manager:** Lida Galindo

**Team Members:** Jillian Avery, Preethi Chennaboyena, Haider Shamsuddin, Charmagne Sealey, Quinesta Barnes, Megan Palmer, Brandy Stanley

## Deliverables/ Benefits

**List tangible/intangible deliverables produced as a result of the project:**

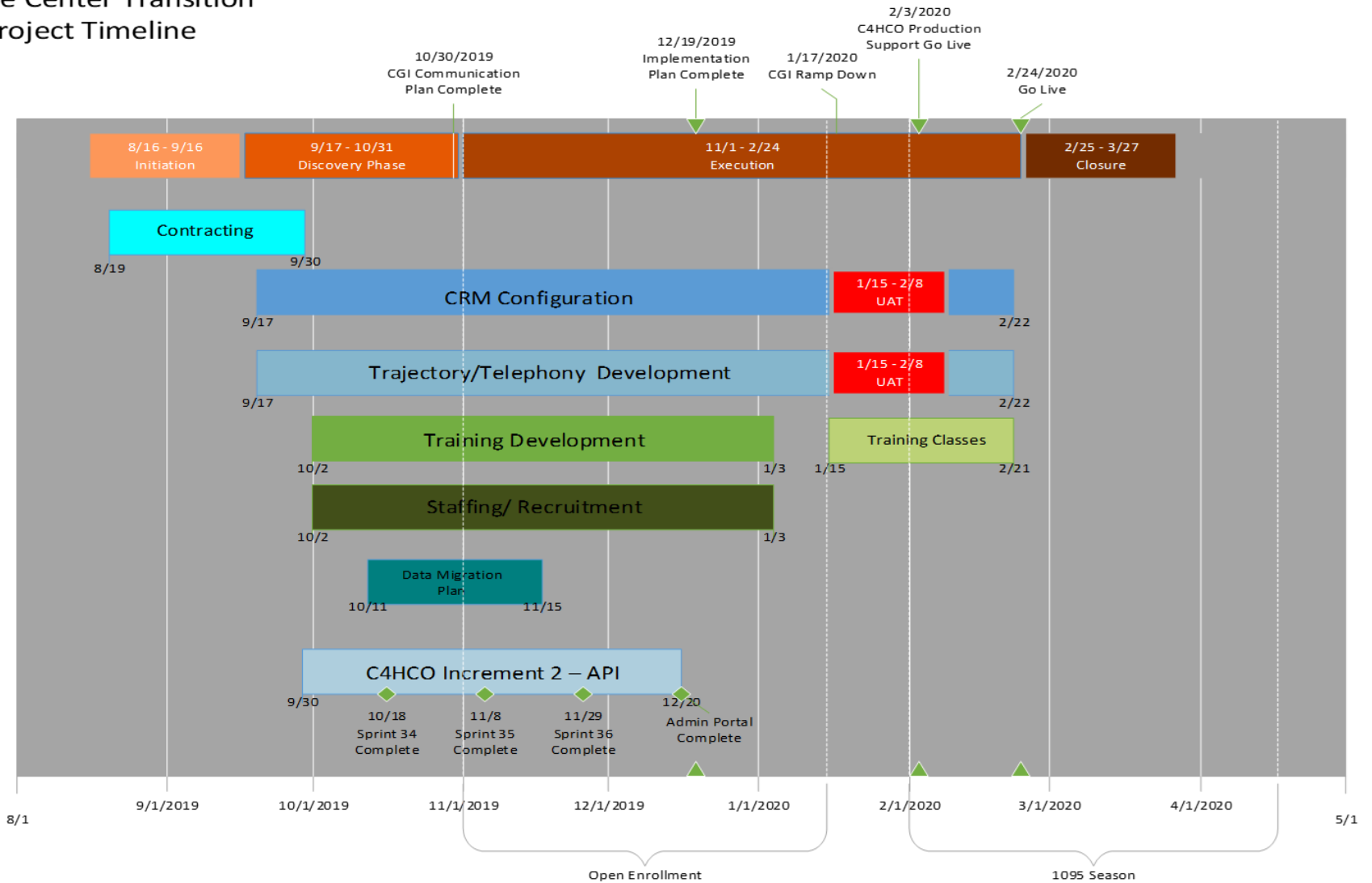
- Determined vendor
- Telecommunication System Implementation
- CRM Application implementation
- Impacted stakeholders trained and informed
- Process and connectivity documentation shared and stored
- Admin portal defined

**What outcome will be achieved?** Simplified and streamlined tool for customer service agents to assist C4HCO customers efficiently and accurately, and provides the organization with data and tools for quality control, staffing management, and audit reporting.

**Strategic Alignment:** Maximize the number of consumers and employers who shop and enroll through the health insurance marketplace, and apply for available financial assistance

Improve the ability of customers to attain and retain the right coverage for their needs

# Service Center Transition Project Timeline



# Project

## Status Report for Week Ending 10/4

Project Manager: Lida Galindo  
Project Sponsor: Kelly G.

**Overall Project Status** On Track

### Project Scope

Implement simplified and streamlined tools and processes for customer service agents to assist C4HCO customers efficiently and accurately. Provide the organization with data and tools for quality control, staffing management, and audit reporting.

### Key Accomplishments since last report

1. Discovery kickoff meetings scheduled
  - In-person shadowing in Denver on 10/10 & 10/11
2. Started Communication with CGI for staffing plan

### Upcoming Tasks

1. Top 5 high volume calls from CGI – Justin
2. Staffing Plan Kickoff Meeting with Faneuil, Discuss facility tour – Nyle/ Lida
3. Overall Communication Plan - Lida
4. Comments for Contract and Payment Milestones to Dave – Meeting to be scheduled
5. Requirements Traceability Matrix - Lida
6. Data Migration questions to Michael and Kelly G – Lida

### Project Milestones

Key Project Milestones	Target Date
Contract Negotiation	9/30/2019
Implementation Plans	12/19/19
Technology Configuration	12/22/2020
C4HCO API Connections	12/20/2019
Trajectory Development	1/15/2020
CRM Configuration	1/15/2020
Recruiting Hiring	1/3/2020
Training Complete	1/13/2020
CGI Ramp down	1/17/2020
Technology Go Live	2/22/2020
Faneuil Staff Go Live	2/24/2020

### Risks and Issues

- Contract Execution and payment milestones passed target date
- Need to align technology scope with Faneuil – API connections to Trajectory instead of CRM