

# Deloitte

**Digital  
Transformation**



# Salesforce Practice Overview

The analysts all agree, we have unmatched global delivery capabilities in Salesforce.

**1000+**

Salesforce implementations globally

**#**

FullForce certified Salesforce Solution accelerators

**9.9**

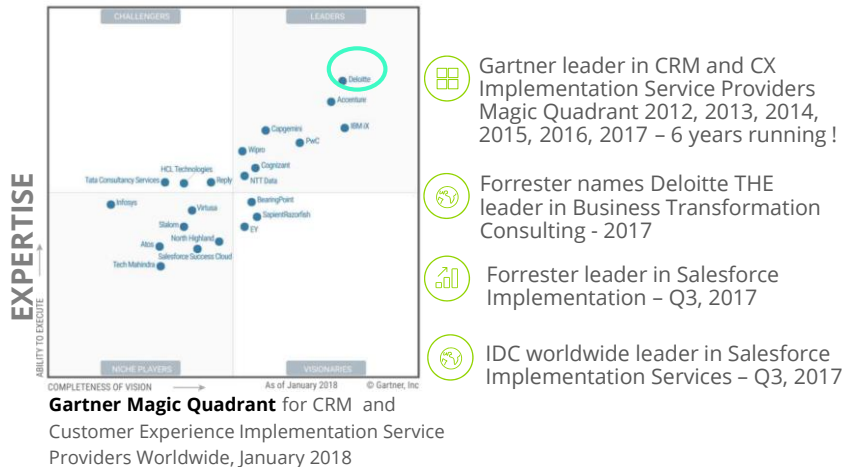
CSAT - #1 for Customer Satisfaction

**5200+**

Global presence: Salesforce consultants worldwide

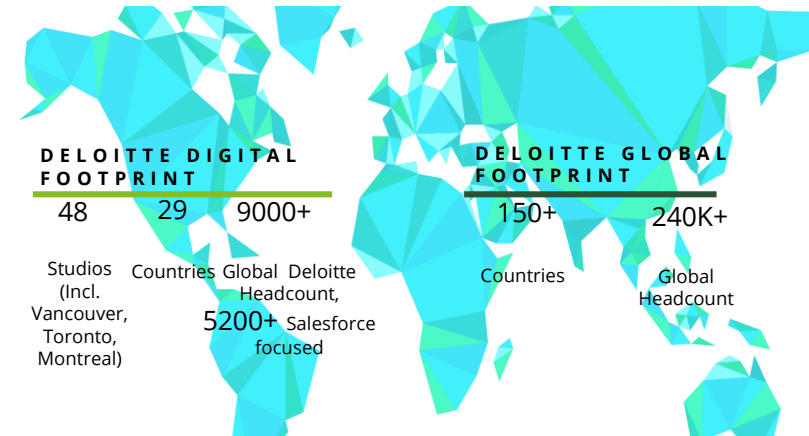
We've been a Salesforce Global Strategic Alliance partner for over 10 years, earning consistently high client satisfaction ratings and repeat business.

Deloitte Digital has over 10,000 Public Sector practitioners serving in 45 states. We understand the disruption and speed of change affecting today's regulatory agencies. With our knowledge, we bring solutions to sort through the complexity of current environment and provide tangible benefits for agencies, citizens, and businesses.



**in Business** Transformation Consulting Q3 2017

**GLOBAL PRESENCE**



**SOLUTION ACCELERATORS**



# Measuring Success in Digital Transformation

If you want an agile digital capability – then we need to change more than technology.



## Enabling Technology

- Can you use a common platform for all regulatory functions?
- Are adjacent application integration needs understood (GIS, third-party testers etc.)?
- How quickly can you perform upgrades?

## Speed of Innovation

- Can you easily accommodate new regulatory changes or new license/permit types?
- Is your current architecture able to support citizen expectations for online capabilities?
- Is your data model and data quality aligned with operational goals?

## Organization Culture and Change Management

- Are your agencies collaborative?
- Do you share common processes today?
- Is the organization model aligned on the same goals?
- Do you have IT skills in house?
- What needs to be done to transition constituents from a legacy process to new digital tools?

# Colorado

## THE INNOVATION JOURNEY



# AGENDA

- Insights to Vision
- Highlight of Sample Projects
- Cloud Transformation – Inclusive of Multi-Cloud Environments – AWS & Salesforce





# Transformational Platform Insights & Vision

We implemented a variety of projects in Colorado  
continuing to expand the Salesforce platform usage

# VISION SESSION WITH THE STATE TO “REIMAGINE GOVERNMENT”

## 2020 vision



STRATEGY	PEOPLE	PROCESS	DATA	TECHNOLOGY
Roadmap	Universal Application	Agile Development	Big Data	Delphix Implementation
2020 Vision	Mobile App	CRM Integration	IRIS	Migration to Cloud
Transition Labs	Electronic Notifications	Testing Optimization	Interoperability	EDMS
Shared Eligibility System	Modernized Correspondences			Platform Consolidation & Service Virtualization

# Business Needs that Colorado Looked At



## Case/Incident Management

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- Routing & approvals
- Adjudication
- Document management
- eLicensing
- Information sharing and collaboration



## Workflow Processes

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- Call Centers
- Workflow actions
- Auto assignment
- Monitoring & escalation
- Tasks and activity generation
- Lifecycle management



## Process Automation

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- Auto email generation and outreach
- Task notification
- Auto routing
- Auto assignment and response



## Task and Activity Tracking

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- Task and activity management
- Scheduling
- Forms and application submission
- Event monitoring



## Data Intake

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- Data entry via forms, web or email
- Data verification and analysis
- Document and content management
- Citizen Self-Service



## Audit & Reporting

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- Record management
- Data visualization and analytics
- Reporting and dashboards
- Visibility and transparency
- Compliance monitoring



# Colorado CBMS Project – PEAK Application



Increased applications that are **“no touch” to 75-80% for Medicaid**, reducing excessive manual processing



Grew from screening of **3 programs in 2009 now to 13**



Increased to collecting **9 program applications online**

## June 2018 Statistics

1,700,039 Applications

Total applications submitted since 2/23/2011

1,589,721 Change Reports

Total change reports submitted since 2/23/2011

472,731 Logins

106,532 of these logins were distinct in the month of June

11,458 Documents Uploaded

9,933 from website and 1,525 from the mobile application

# Universal Application

- Universal Application allows users to apply for multiple Assistance Programs through an online portal and manage their ongoing benefits.
- The application has features to route application information to multiple agencies
- Allows recipients to manage their ongoing benefits, submit life change events, and re-determine eligibility.

## Highlights

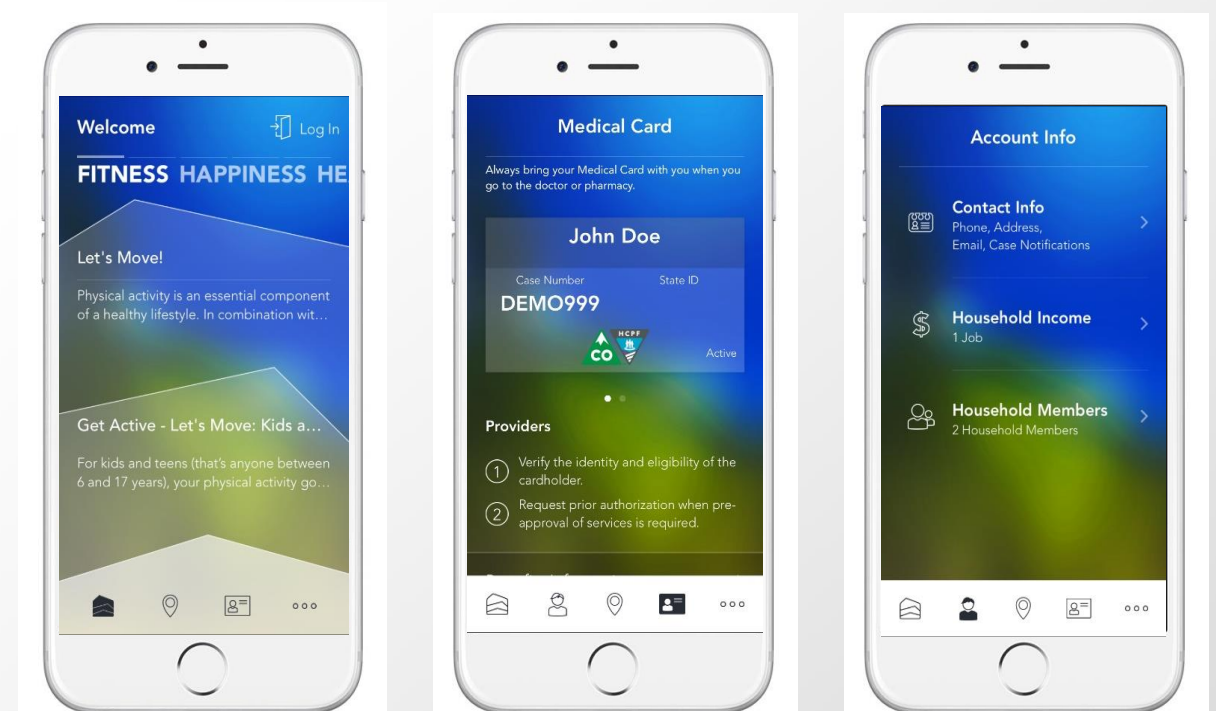
- Fully Cloud-based (SFDC Platform)
- Friendlier user experience with UX 2014 design standards
- Aligns with the State's overall vision of migrating systems to cloud based solutions to save on ongoing hardware and licensing maintenance costs
- Real time determinations were enabled by Identify Resolution Information System (IRIS) supported by Apache SOLR technology



## Improving Access

### MOBILE 24/7 ACCESS User Experience

Colorado Medicaid members are the first Medicaid members to enjoy an elegant mobile experience that helps them manage their account, maintain eligibility, and make healthier decisions. Finding a provider is now easy – and carrying an electronic medical ID card on a device ensures they'll always have it handy. The result? More knowledgeable and empowered members, fewer customer support center calls, and reduced paper submissions.

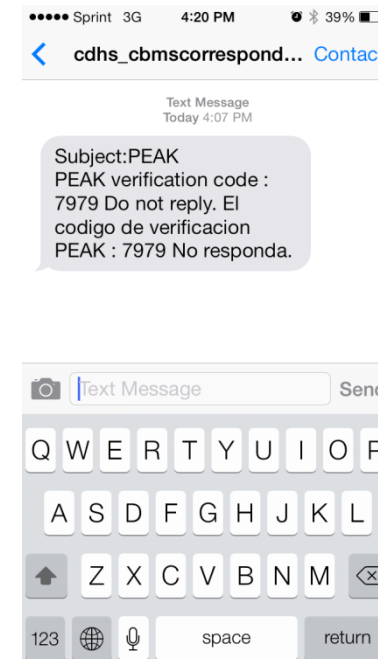


# Electronic Notifications

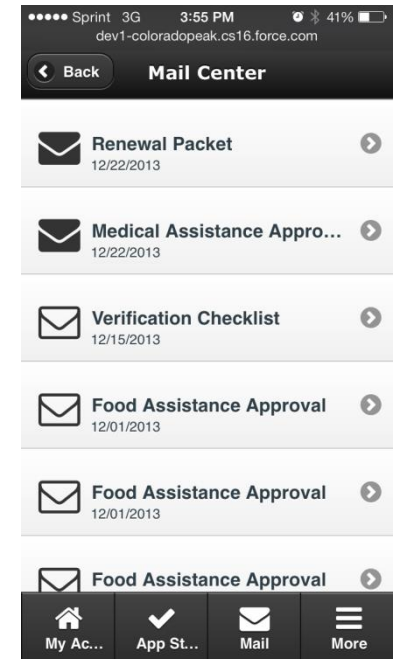
## Highlights

- Built using SFDC Platform
- Display correspondence within the PEAK website
- Allow Colorado users to receive email and text notifications when correspondence is available on PEAK
- The Email Blast Communication project allows certain CBMS users to send mass text and email messages to Colorado benefit recipients who enroll in these services.

## Text messages



## Mobile Mail Center (Part of the PEAK Mobile App Project)



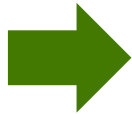
# CRM Integration

## Modernization Drivers

**Improved Customer Service for Medicaid applicants and clients**



**Improved satisfaction with customer service for Medicaid applicants and clients**



**Decreased hold durations, call volume per Representative, and call abandonment rates**



**Efficient problem resolution**

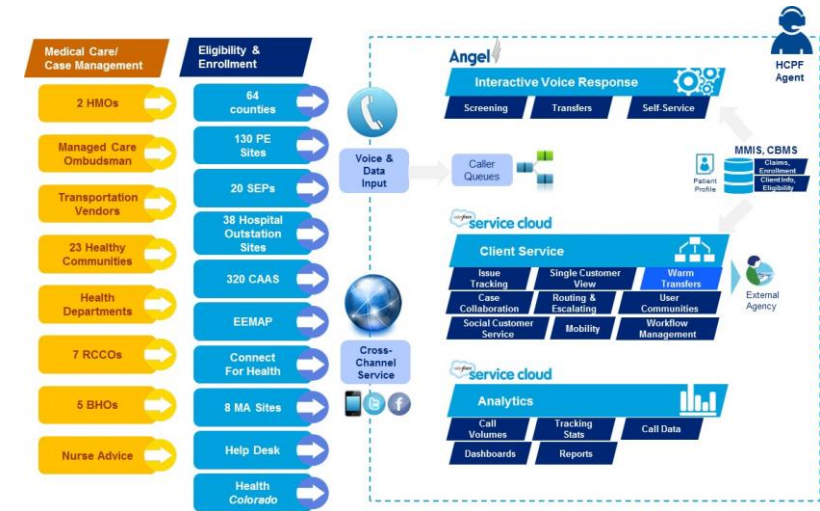


**Need for effective screening mechanisms**



## SOLUTION

- Integrated Knowledge Base
- Integrated Collaboration Tools
- Standardized call flows
- Extensive Analytics and call metrics
- Faster service with consolidated patient profile
- Seamless integration with social media
- Automated workflows through IVR
- Automatic transfers to outside agencies per pre-defined rules
- Single-pane view for all issue tracking and client information
- Ability to track and work on multiple cases/calls simultaneously
- Automated GPS location tracking
- Automated unique Voice Signature tracking
- Built-in and highly configurable call flows using visual workflow tools



## KEY CHALLENGES TO BE ADDRESSED

# Lessons Learned



### configuration Management

Strict source control and automatic builds help a distributed team easily management configuration management practices



### Right Licenses

Salesforce has multiple types of licenses and products – choosing the right license type and product is the key



### The Right Partner

A relationship with the right partner can help the organization navigate a maze of important initial choices, eliminate some key hurdles, and get started on the right foot



### Training and Adoption

Adopting a new system with the depth and power of Salesforce usually represents a significant level of organizational change, requiring some careful “change management” planning



### Set Realistic Goals

To get the most from your investment, it's important to roll out functionality early and often. Start with small goals that track against your overall vision



### Governor Limits

When designing a solution, practical governor limits should be carefully considered (e.g. database objects, API calls, custom labels etc.)



### Architecture

Development should adhere to the architecture with reviews in place so that the current architecture is not bypassed unless absolutely needed



### Standardization

Leverage the platform functionality where possible to deliver maximum business value to stakeholders (reports, dashboards , workflows, etc.)



### Data Growth

Storage is robust, yet limitations of salesforce database should be considered when converting existing databases or syncing of data with Salesforce. Storage costs might need to be considered depending on the nature or number of existing records and potential record growth



### Version Control

Monitor Salesforce version release changes and run regression testing every time a release is deployed to a new org





# Projects

We implemented a variety of projects in Colorado  
continuing to expand the Salesforce platform usage

# PEAK Citizen Portal Project

## Human & Health Services Eligibility Citizen Portal

### Spotlight:

- SFDC Platform (Force)
- Designed UX and converted to SFDC
- Allowed citizens to (1) check for eligibility and (2) submit an application



### Issue

*Need to reduce excessive manual processes of data entry for workers. Lack of outreach and accessibility to public service benefits for citizens.*

### Solution

A Citizen Portal - Tightly integrated Force.com web-based portal that sports 5 key features:

- Eligibility Pre-Screening for welfare eligibility
- Online Dynamic Application to collect data and pass to eligibility system
- Account Dashboard to present status of cases and real time benefits
- Online Change Reporting to report changes to cases
- Reports to display monthly/cumulative usage

### Our Role/Approach

- Converted web-based portal from Java based solution to force.com solution
- Designed using UX-2014 design principles for more friendly user experience

### Impact

- Web-based self-service portal
- Dynamic and secure online application for clients and providers
- ~ Over 1,700,000 applications submitted
- ~106,532 unique visitors per month

# Call Center Project

## Medicaid Call Center (Virtual Voice & Data System) with Case Management

### Spotlight:

- :Service Cloud & Five9 Integration
- 1st 100% cloud-based call center to integrate State and Federal Medicaid claims information



### Issue

*Need for state-wide call center environment integrating both State and Federal Medicaid claims.*

### Solution

A CloudMix Solution - Salesforce Service Cloud for CRM and Angel Cloud for Interactive Voice Response (IVR) with innovative features like:

- Smart call routing, live call quality monitoring and voice biometrics to uniquely identify callers
- Extensive analytics (call reports, application performance reports)
- Application submission (internal and outsourced) and case management

### Our Role/Approach

- Proven SFDC/Five9 deployments across US
- Systems Integrator with working policy and system knowledge

### Impact

- First 100% cloud-based, call center integrating both State and Federal claims information into a single, 360 degree view. Reduced backload and elapsed time to case closure.

# Claims Adjudication Project

## Automated Adjudication Tracking, Workflow Management, and Reporting System for Unemployment Insurance

### Spotlight:

- Designed, developed and implemented in 6 months
- Consolidation of multiple data sources for USDOL reporting



### Issue

*Need for better management and reporting of escalated unemployment insurance claims requiring adjudication.*

### Solution

Adjudication Tracking System - Salesforce.com implementation for the management of escalated unemployment insurance claims and reporting:

- Automated Issue Escalation, Routing and Assignment
- Performance dashboards for users & leadership
- Dashboard Reporting for TWINS and USDOL
- Online collaboration between UI Adjudicators

### Our Role/Approach

- Assisted with design, development and implementation using Salesforce.com technologies

### Impact

- Automated Case Creation and Management
- Improved issues consolidation for UI claims resolution

# Legislative Tracking System

## Automated Tracking and Management of Legislative Analysis and Findings

### Spotlight:

- :SFDC Platform (Force)
- Designed, developed and implemented SFDC
- Consolidation of multiple data sources for USDOL reporting

### Issue

*Need to automate and track legislative analysis and findings for all legislative drafts, bills and amendments.*

### Solution

A Cross-Departmental Tracking System – A Salesforce.com solution for the management of legislation, with the following features:

- Department-specific 'Bill Analysis' case creation and analyst assignment
- Automatic Legislative Draft Bill and Amendments updates
- Case Management and Analysis Reporting for each Draft Bill

### Our Role/Approach

- Built a collaborative, workflow based process for managing responses to bills
- Replaced legacy tools with current technology

### Impact

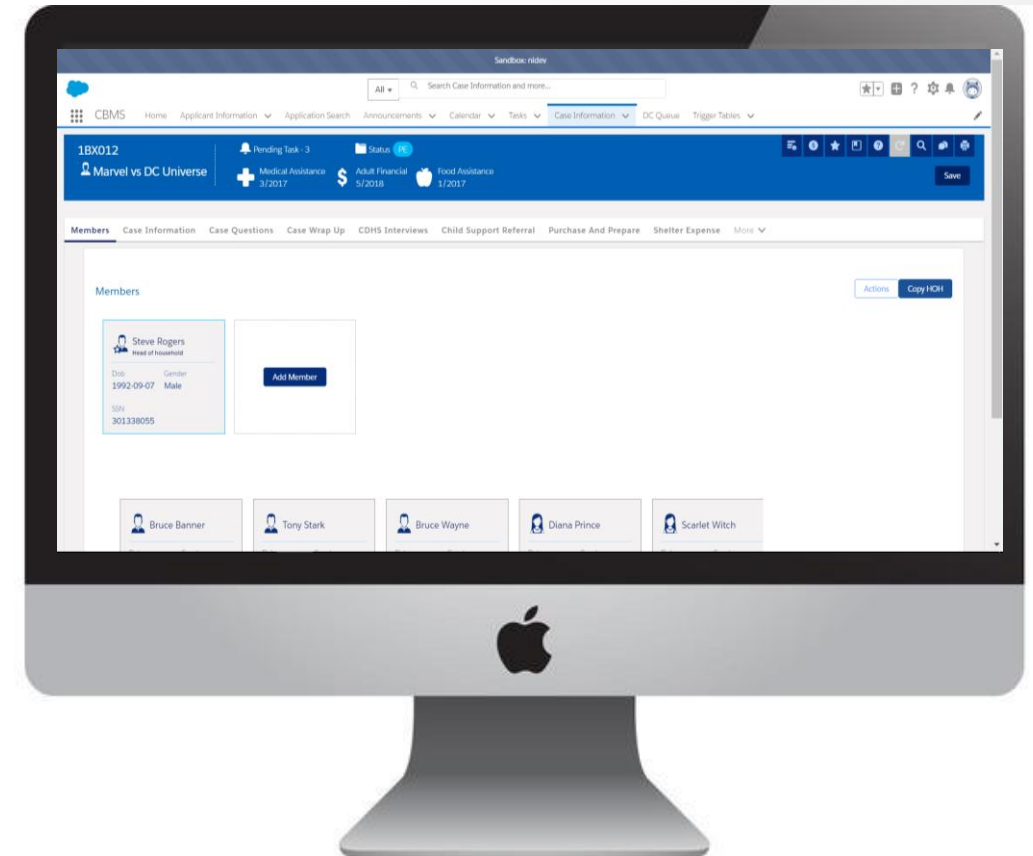
- Gained efficiencies by automating manual steps in the current process
- Near real-time access and automatic updates to all departmental analysts forms/reports



# Integrated Eligibility System

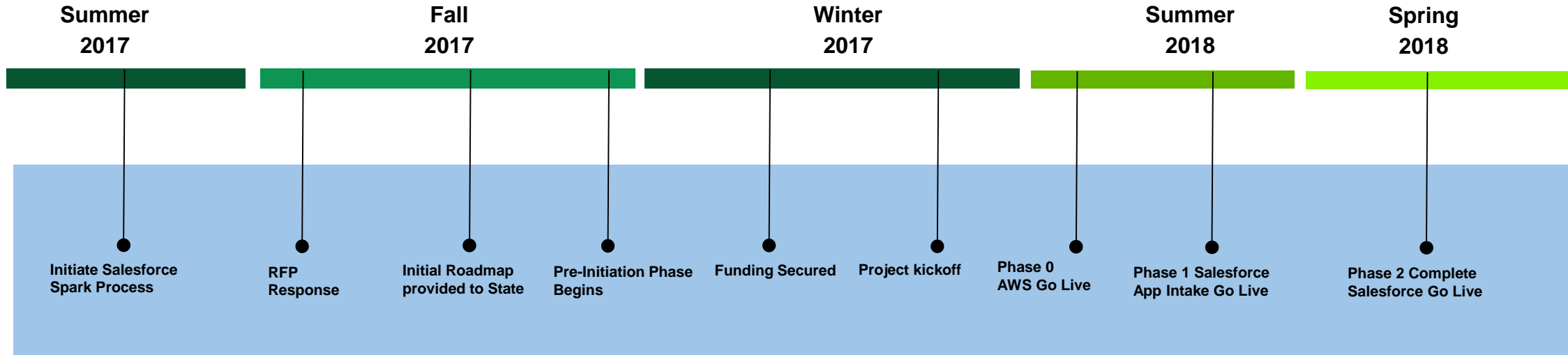
**Streamlined, interoperable system**  
**Predictable cost model**  
**Modular and reusable**

Implementing an re-useable Case Management platform that can be extended to other programs, using SFDC's collaboration and extended functionality. Providing sophisticated UX/UI design taking advantage of enhanced workflow and UI capabilities. Re-use existing investments in Mulesoft, and provide a data synchronization solution that allows for backend services to remain in place, minimizing implementation risk.





# Transformation Timeline of Events



**Spark Process generates opportunities to be included in RFP**



**After contract award, State Roadmap created**



**Pre-Initiation Phase starts to set up project**



**Requested funding approved begins resource staffing**



**Phased Go Live Approach**



# Demonstration of Application Intake

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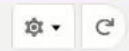
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Announcements

Announcements

New Import



1 item • Sorted by Summary • Filtered by all announcements - Status • Updated a minute ago

	SUMMARY ↑	START DATE	END DATE	
1	<a href="#">Advisory notice does it come to home page</a>	6/12/2018 12:00 PM	6/17/2018 12:00 PM	▾

## Application Initiation



### Application Initiation

More

8 items, sorted by Logged In User  
Filtered by Applicant Information

- Applicant Information: [346 \[Test SDC\]](#)
- Applicant Information: [2 \[Jerry Mouse\]](#)
- Applicant Information: [50 \[Ziplock Haven\]](#)
- Applicant Information: [334 \[SDC Test\]](#)
- Applicant Information: [332 \[First Test Last Test\]](#)
- Applicant Information: [307 \[FIRST LAST\]](#)
- Applicant Information: [286 \[Team Training\]](#)
- Applicant Information: [183 \[TeSTING SDC\]](#)

## Today's Events



Looks like you're free and clear the rest of the day.

[View Calendar](#)

## Today's Tasks



Nothing due today. Be a go-getter, and check back soon.

[View All](#)

## Quick Links

- [Service Desk](#)
- [Department of Health Care Policy and Financing](#)
- [Colorado State Web Portal](#)
- [Colorado Department of Human Services](#)
- [HIPAA](#)
- [Click here to download Registry files](#)

# Delaware

## THE FOCUS JOURNEY



# Delaware Case Study






DE For Our Children's Ultimate Success (FOCUS) Journey

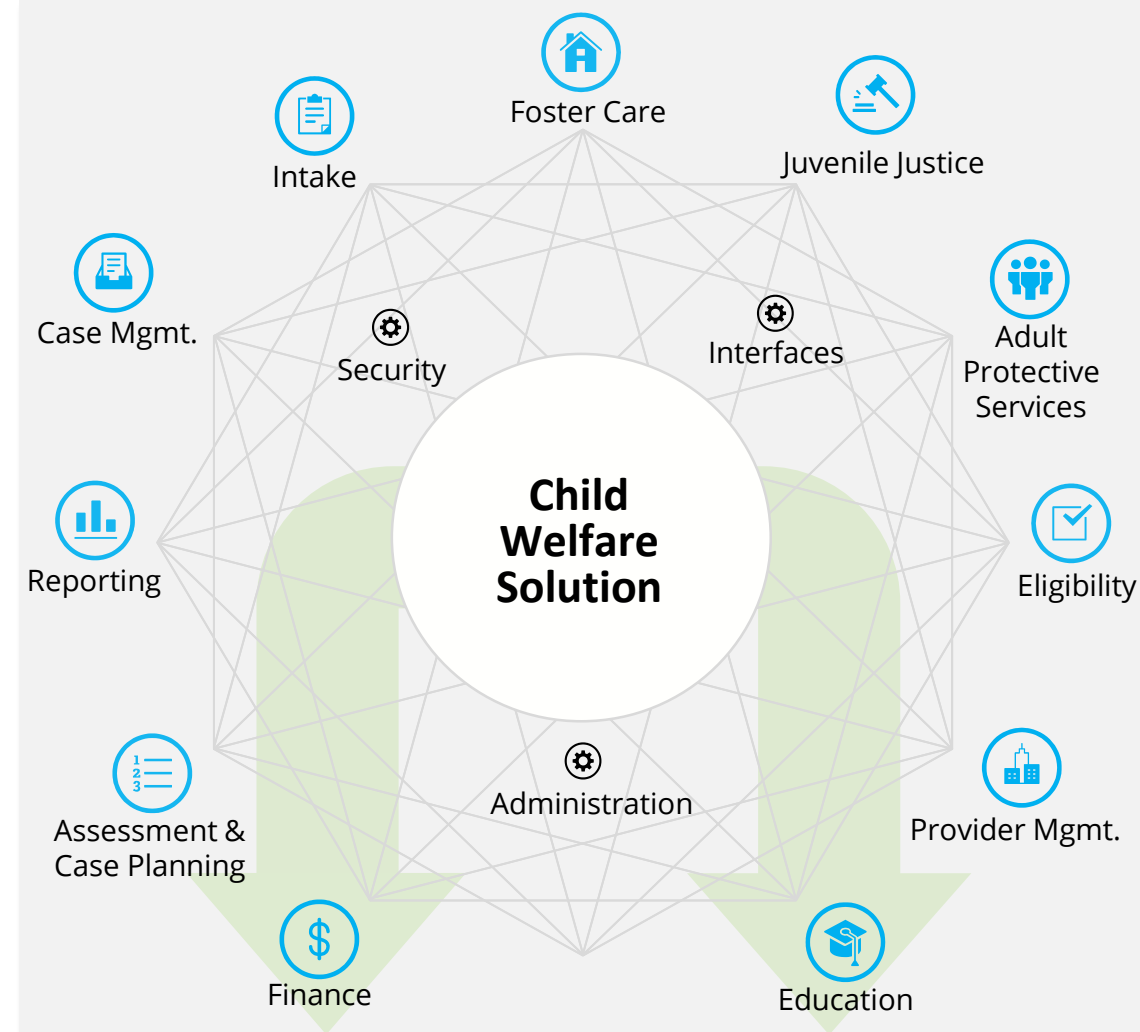
# DE Challenges and Solution

Delaware FOCUS is a case management system that integrated 4 divisions (Division of Family Services, Division of Youth Rehabilitative Services, Division of Management Support Services, and Division of Preventative Behavioral Health Services) within one enterprise-wide solution.

The goal of FOCUS was to provide high-quality care for children and youth in ways that lead to improvements in their functioning and in the functioning of their families. The integrated children services solution will support services that are child centered, individualized, family focused, strength and community based, culturally respectful, appropriate in type and duration, and seamless within and across organizations.

## Business/ IT Pain points:

-  **High Cost of Ownership**
-  **Aging Infrastructure**
-  **Poor Data Quality**
-  **Obsolete, manual and inconsistent reporting**
-  **Aging Legacy Systems Technology**



## Proven Delivery ...



### State of Delaware

Solution delivered on a dedicated Salesforce government cloud, aligned with FedRamp, has set the platform for **State of Delaware** to achieve a fully-integrated Case Management System in < 20 months



### State of Louisiana

**Modularity** of Salesforce Lightning solution components allowed for selective implementation of Intake and Investigation modules for the State of Louisiana



# DE Success Story

Delaware FOCUS solution Achievements

- ✓ Built over **1300 pages** on the world's leading cloud solution
- ✓ Built **52 interface jobs** to send and receive data from various partners
- ✓ Converted over **600 tables** from a **25 year old** non-relational database, to a cutting edge cloud technology
- ✓ Created **10,000+ pages** of content with over **30,000 screenshots** related to training
- ✓ Created over **130 standard reports** and **6 Einstein reports**

The Salesforce.com Platform addresses these challenges and provides Children Services agencies **valuable benefits** in their mission to effectively deliver services to children



Increased Time  
Spent In the  
Field

Increased  
Employee  
Morale

Increased  
Workforce  
Productivity

Mobile/ Social  
Enabled

Lower  
Cost

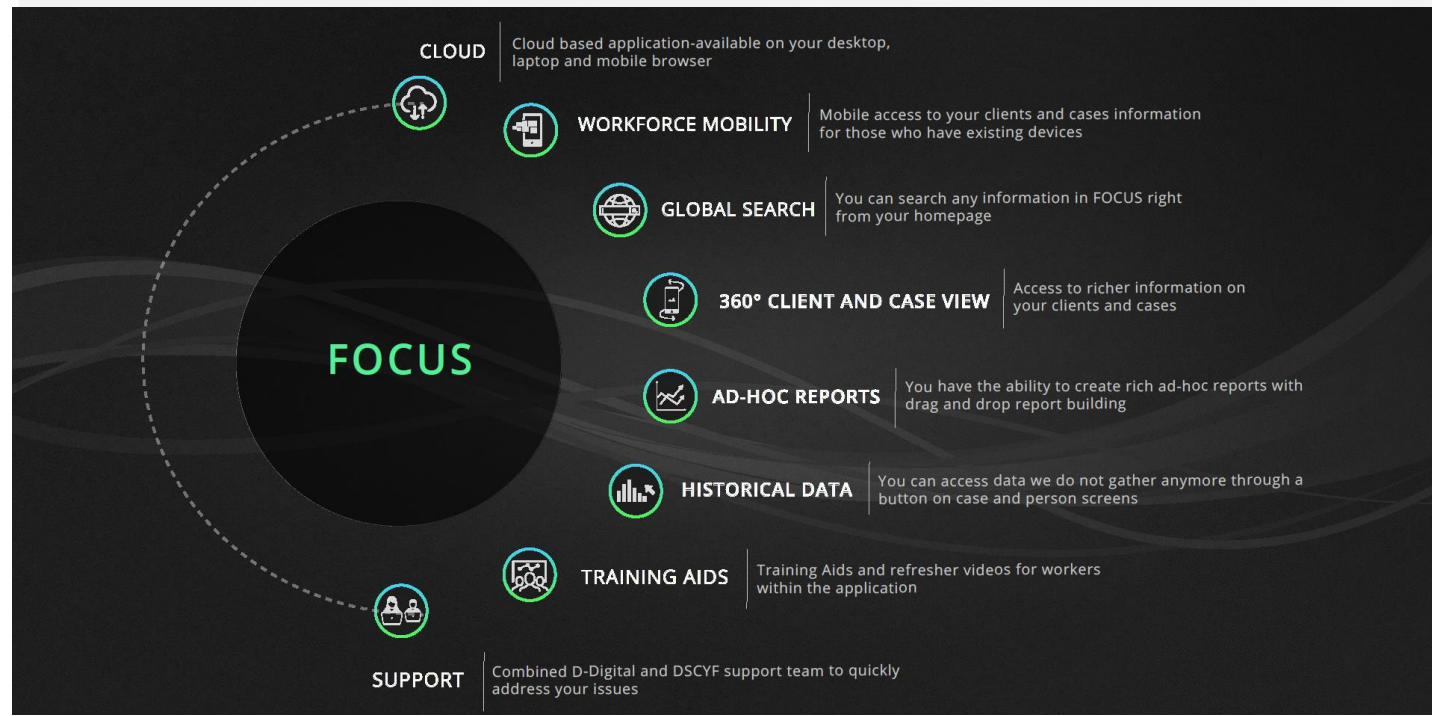
## By the Numbers:

10,000+  
Hotline Intakes  
Processed

600+ Child  
Placements  
Processed

1,000+ Invoices  
Created  
amounting to  
~\$32M

~3,000 Child  
Cases Closed



# Unique features of Salesforce Leveraged



## Feature-rich Development Platform & Configurable UI

- Common development environment, tools, capabilities for all enterprise salesforce-based applications
- Industry-leading functions and features, continuously enriched based on feedback from hundreds of thousands of users



## Integrated Security

- Fine-grained access control and security for applications built on the platform
- Management of roles, group, and access through built-in tools



## Collaboration Support

- Built-in Agent social network
- Quick exchange of information about cases and knowledge articles
- Ability to "Follow" cases or records
- Instant-Messaging and File sharing
- Share files and collaborate to refine answers



## Web Platform Compatibility

- Multi-platform support
- Windows, Chrome (Current version), Firefox (Current version), IE (9, 10, 11), Apple OSX, Safari 11, Mobile Support, iOS, Android



## Configurable Business Logic

- Visual and easily managed definition of decision making rules
- Visual process builder for complex rules



## Audit Trails

- OOTB Setup Audit Trails
- Built-in capability to audit changes on per-object basis
- Audit needs defined and easily modified through built-in tools



## Real Time Reporting & Analytics

- Rich ad-hoc reports using drag and drop custom report building and interactive drill-down graphs
- Functions such as display, filter, sort, export, print, drill down etc.
- Track key metrics such as status of service cases, customer satisfaction indices, agent productivity



## Workflow Approval Processing

- Trigger automated knowledge base searches
- Interactive call scripting, returning calls, quotes, and resolutions
- Allows automated approvals for critical processes



## Robust Integration

- Real-time integration through API calls and Web Service Invocation
- Asynchronous and batch integration through ETL processes, bulk data management
- Mulesoft is at the heart of all integrations



## Event Monitoring

- OOTB logging and tracking of granular details of user activity/events
- Separate Dashboards and Logs can be accessed for events such as Logins, Logouts, URI, Page loads, API calls, Report exports etc.



## OOTB Printing

- OOTB logging and tracking of granular details of user activity/events
- Separate Dashboards and Logs can be accessed for events such as Logins, Logouts, URI, Page loads, API calls, Report exports etc.



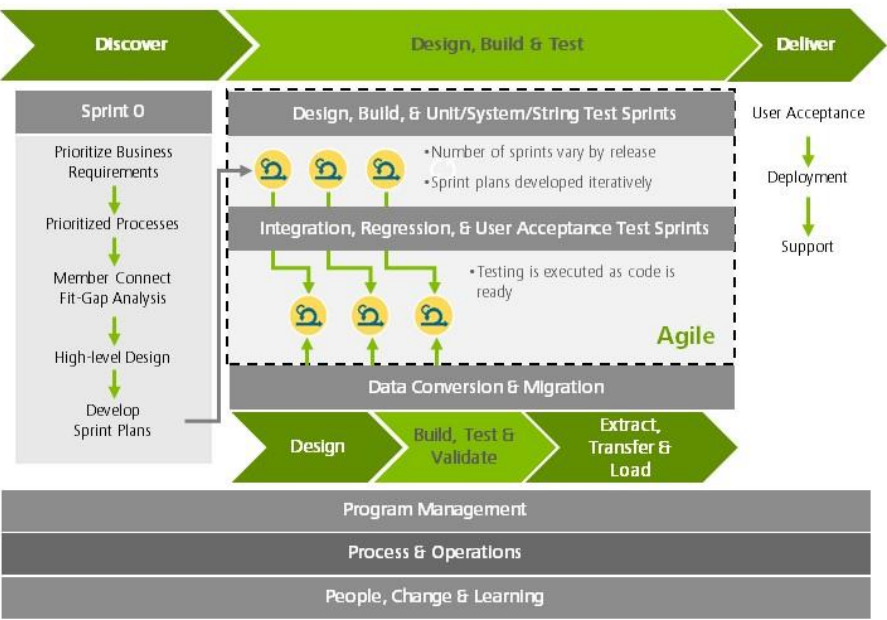
## Mobility On-The-Go

- Responsive design model delivers screens developed in standard toolset to all form factors with layouts optimized to form factor and resolution
- iOS and Android support

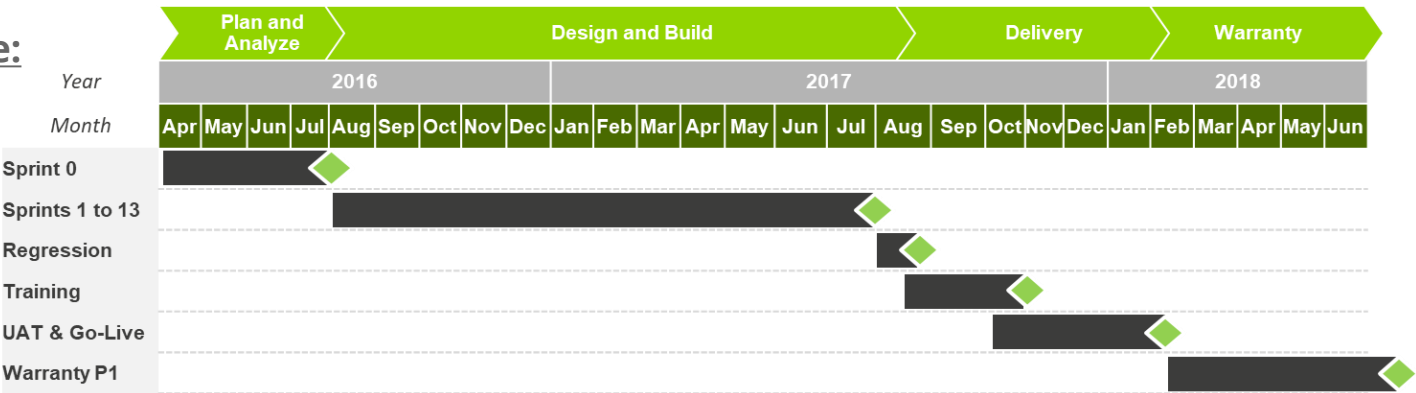
# Agile Development

- Incorporated Agile development practices while keeping within the parameter of a defined fixed project scope.
- Blended Agile concepts with the predictability of a defined scope, which is delivered iteratively and with transparency.
- Took advantage of sprint cycles to allow for thorough design, development, and testing incrementally for a quality final product .
- Some of the benefits we've observed with Agile include:
  - Ability to accelerate delivery of high priority features
  - Enhanced Team collaboration
  - Issues are identified early
  - Increased transparency and feedback

## Hybrid Agile Delivery Framework



## Project Timeline:



# Human Centric Design Approach

User Experience activities and outputs were designed to represent the human ecosystem surrounding the technology solution. Personas and Journey Maps were used throughout the design and development lifecycles to provide context, understanding, empathy, and points of departmental confluence to consider for the end solution



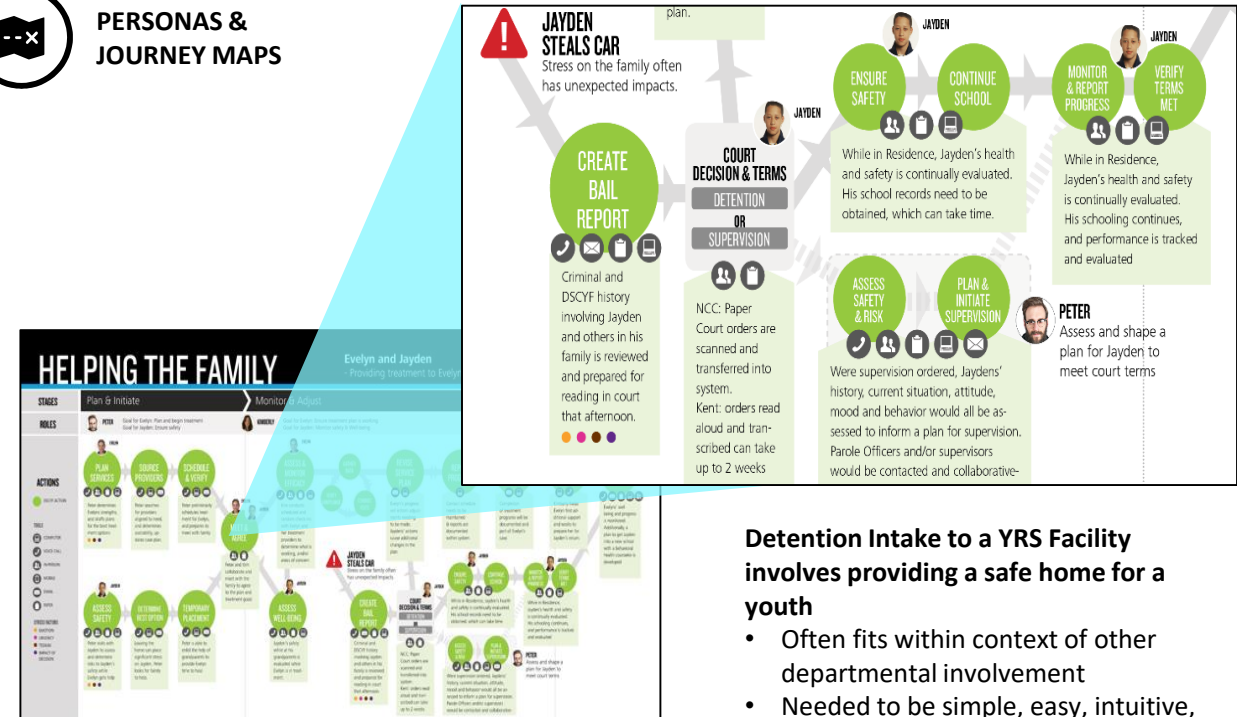
## DESIGN THINKING SESSIONS



## USER RESEARCH



## PERSONAS & JOURNEY MAPS

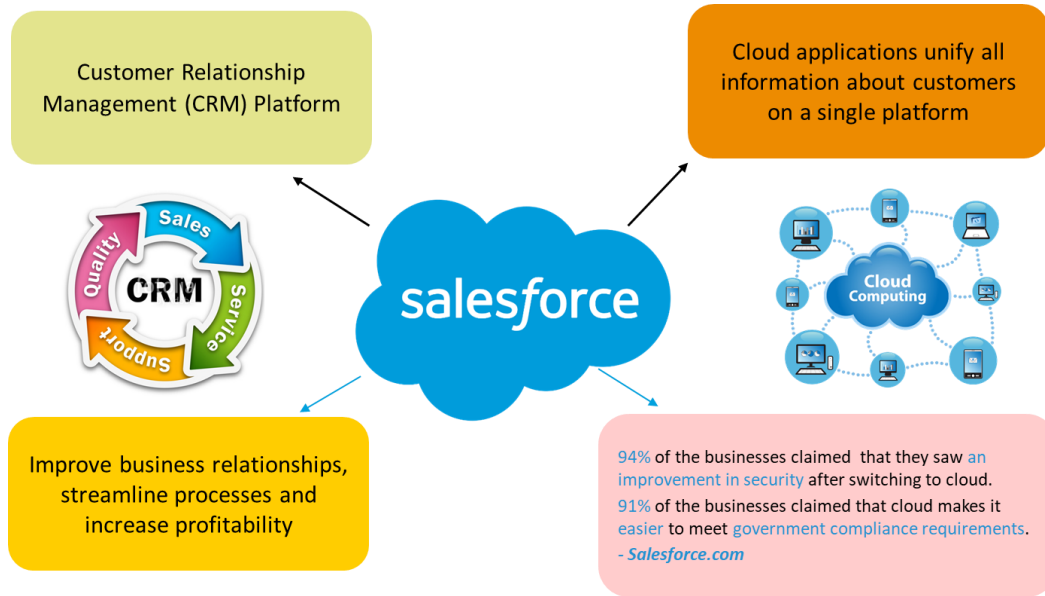


### Detention Intake to a YRS Facility involves providing a safe home for a youth

- Often fits within context of other departmental involvement
- Needed to be simple, easy, intuitive, guiding Intake Officer through process, and ensuring compliance
- Intake Officers turn over often, with little time available for training and using the system



# Why Salesforce?



## Benefits of Cloud Platform



**Cost Savings**



**Speed**



**Scalability**



**Flexibility**



**Reduced Complexity**



**Multi-Tenant Architecture**



**Technology Refresh**



**New Projects**

## Benefits of Salesforce

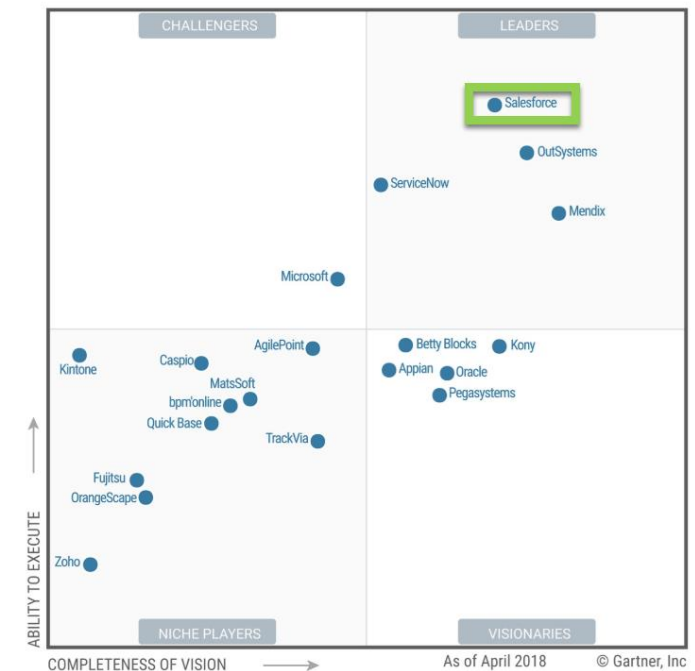
- Streamline, standardize, and optimize business processes across business units.
- Increase effectiveness and efficiency in intake and case management activities.
- Improve the user experience for the end user community.
- Improve business decision-making through analytical reporting.
- Configure the business requirements effectively and efficiently.

Salesforce.com Government Cloud has achieved and maintained FedRAMP Agency Authority to Operate (ATO) at the moderate impact level issued by U.S. Department of Health and Human Services (HHS)



Salesforce is a proven leader ...

Figure 1. Magic Quadrant for Enterprise High-Productivity Application Platform as a Service



As of April 2018 © Gartner, Inc

Source: Gartner (April 2018)

# Michigan

## Shaping the Customer Experience



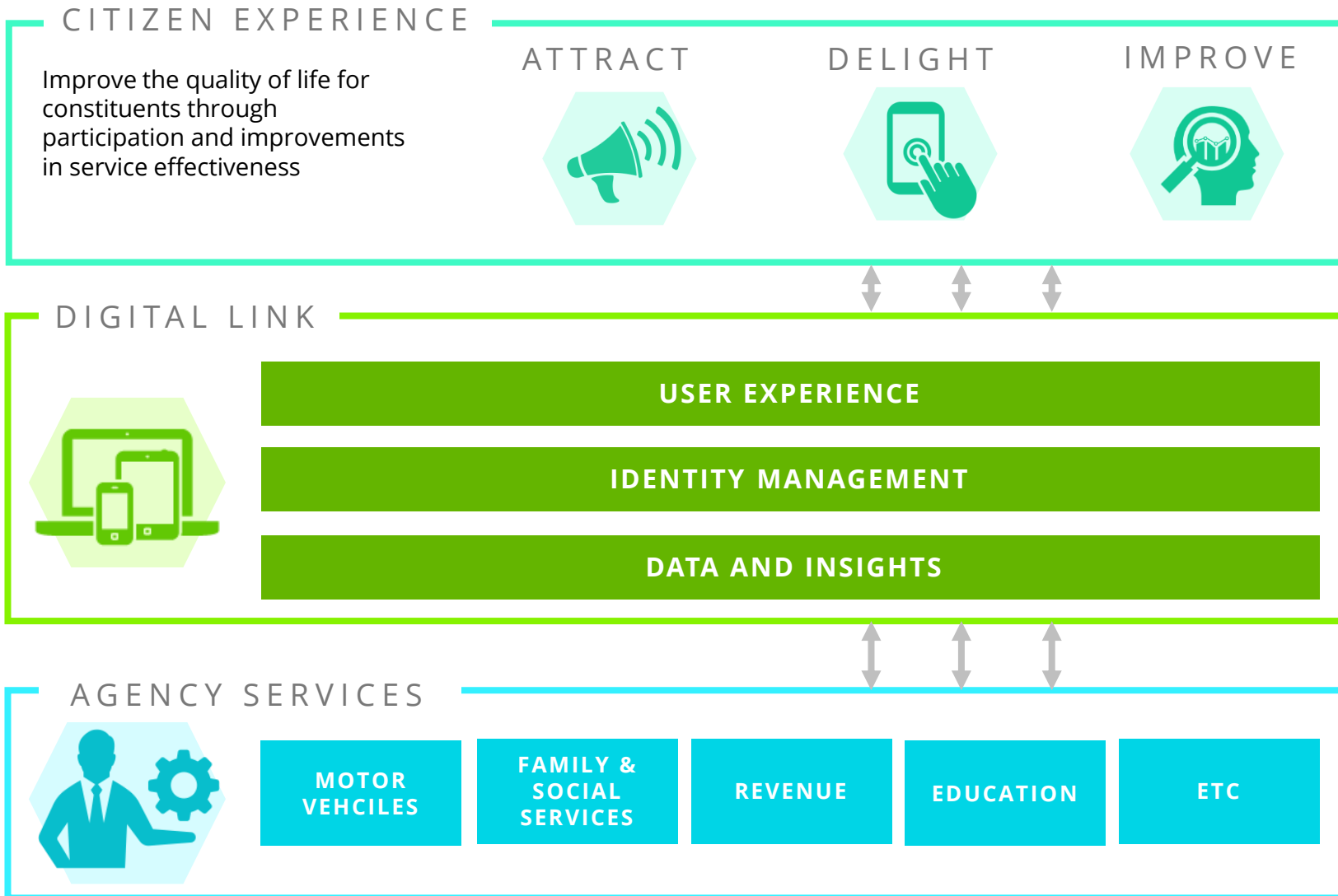


# Improving Client Service Delivery

Attract users, connect the data, develop insights, implement change, evaluate success.

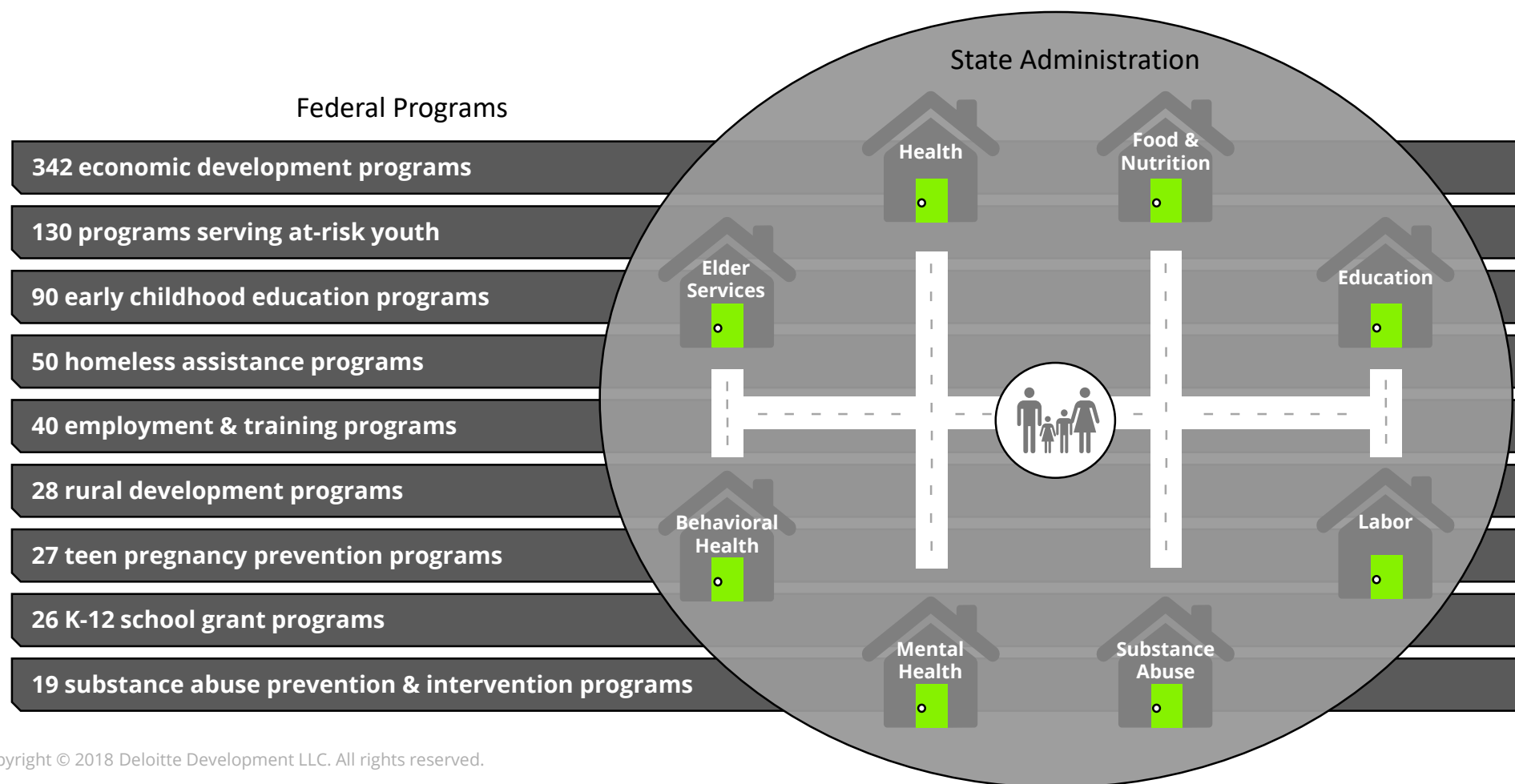


# How We Visualize the Solution Building Blocks



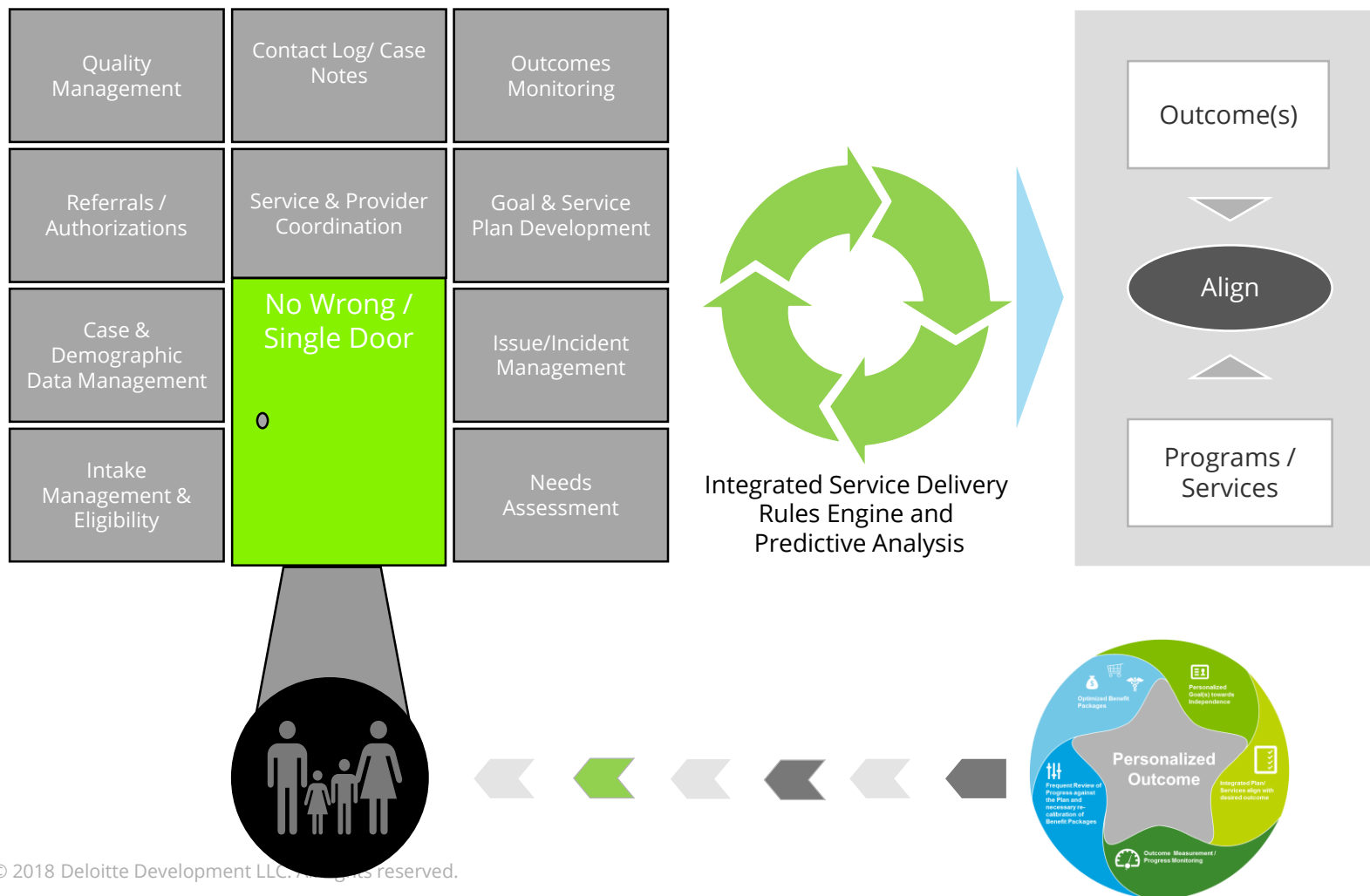
# Integrating Health and Human Service Delivery

Today's economy has created an environment in which more people receive human services than at any other point in history. Those services are delivered via hundreds of programs, each with their own set of guidelines and rules – leaving the individual on their own to pick the right door as they strive to achieve self-sufficiency.



# Moving to an Outcome-Centric Delivery System

A personalized outcome focused delivery model, one that focuses on the individual or family as a whole and aligns their desired outcome with the necessary program and services– positions human services agencies to deliver more effective services that lead to better outcomes.



# States are facing similar challenges

Deloitte is partnering with multiple states to help define and operationalize their customer experience and all are facing similar challenges.



## CHANNEL CONFUSION

Agencies have taken the steps to transition to digital submission channels, but fail to get adoption due to culture, process and infrastructure roadblocks



## UNIONS & STAKEHOLDERS

Enforcement of digital channels is often perceived as attacking jobs and reducing accessibility



## COMMUNICATION

Agencies want to make it easy to communicate with their clients, but have multiple call centers, direct lines to case workers, voicemail boxes that are full and a continued reliance on mail/paper/wet signatures



## DEFINING SUCCESS

Agencies are defining success differently than their clients. It is common to think there are 30 days to process, but our clients want determination today.

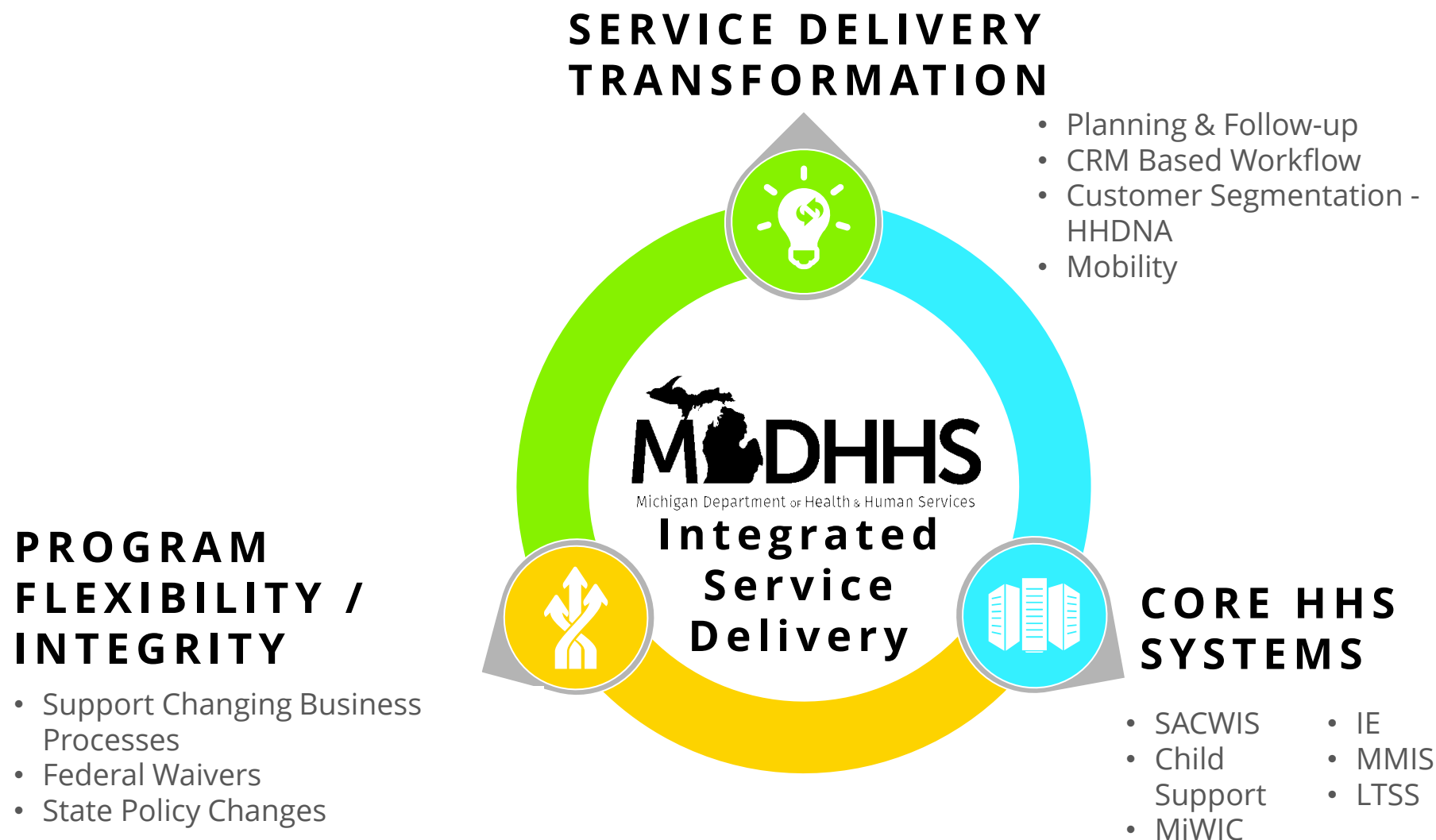


# Integrated Service Delivery (ISD)

THE PROMISE AND  
THE CHALLENGE

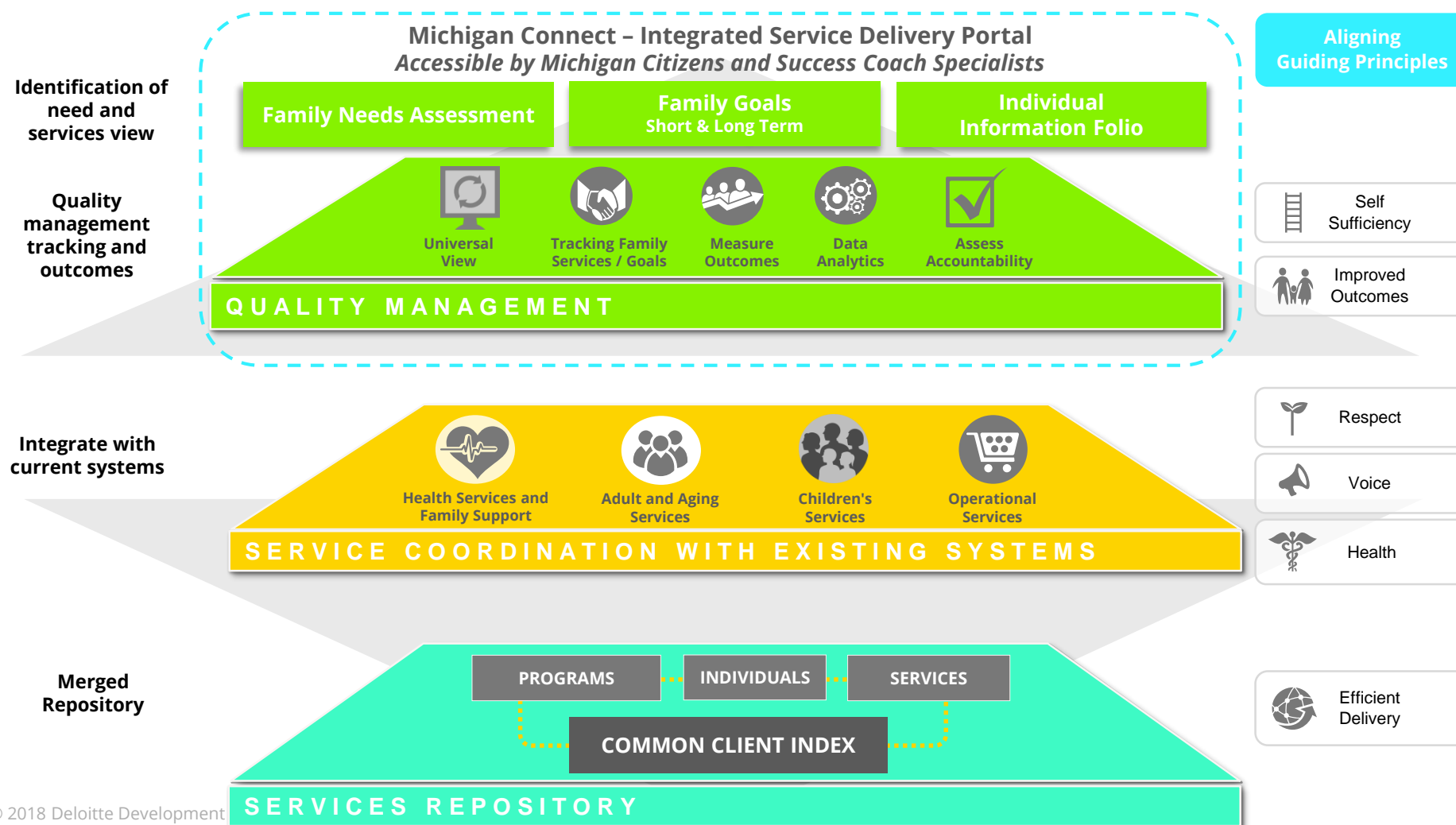


# Components of Integrated Service Delivery



# ISD Solution Overview

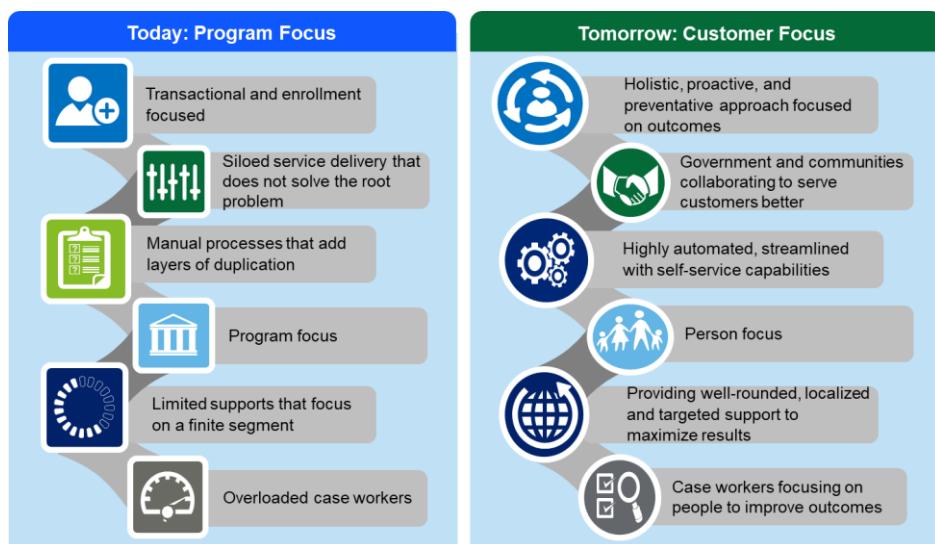
A holistic view of coordinating family services and tracking outcomes.



# Michigan ISD: A Three Year Transformation

Integrated Service Delivery is a comprehensive, transformative effort in Michigan to better integrate programs and improve customer service and outcomes.

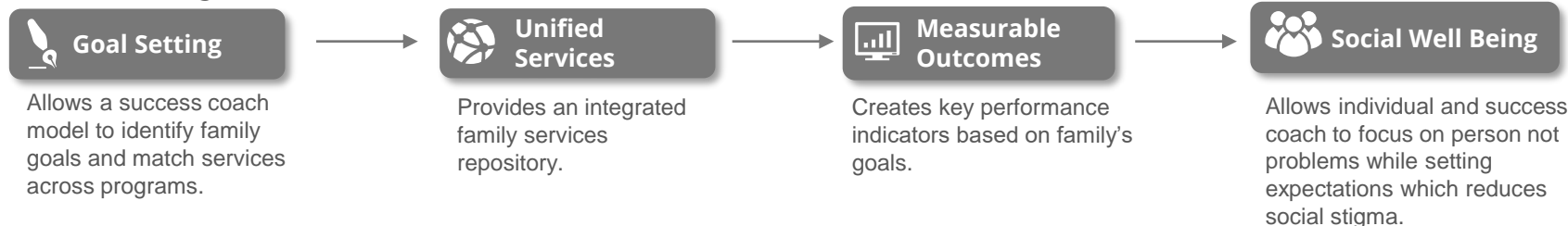
## VISION



## APPROACH



## BENEFITS



Integrations:211

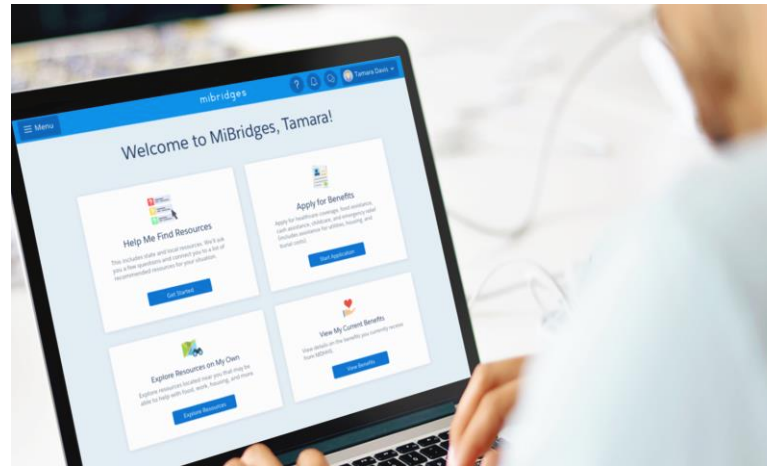
MiWorks

MiHealth

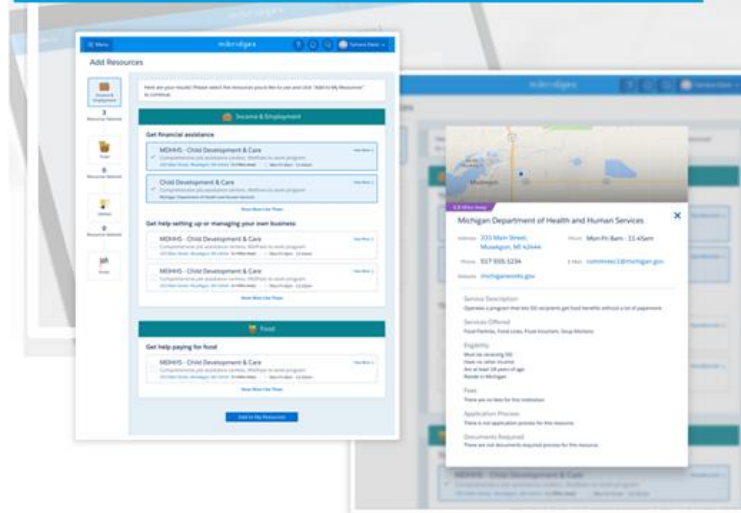
MiLogin

Great Start

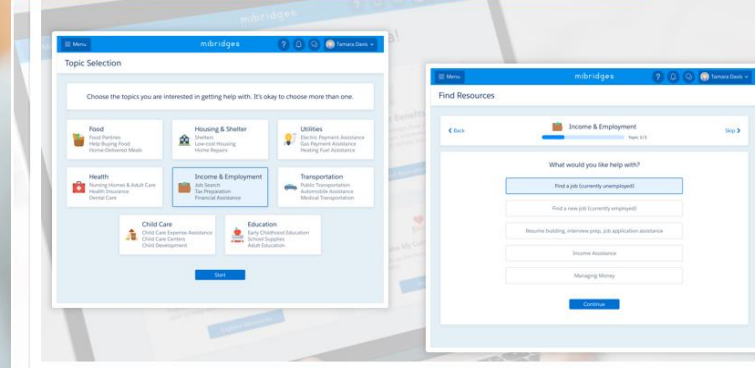
# Michigan ISD: A Three Year Transformation



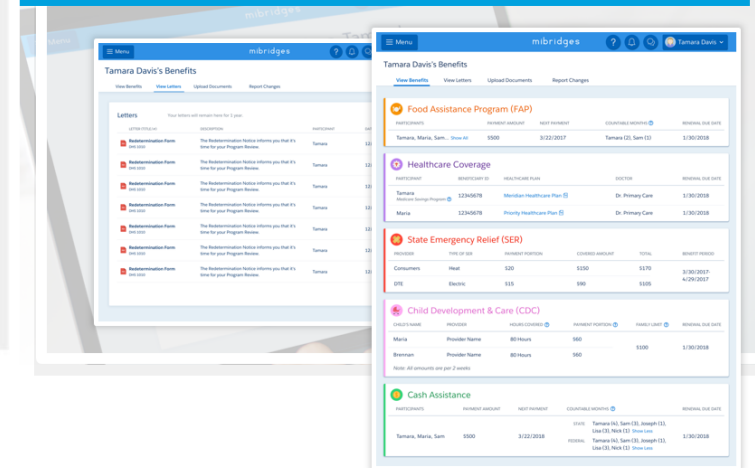
State assistance programs and community resources presented together in one set of recommended supports



Guided assessment which reveals users' underlying needs in a more proactive manner



Modernized public benefits self-service features with a mobile device emphasis, including more detailed views of benefit information and benefit maintenance





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# Thank you..

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