

# STEERING COMMITTEE

Ohio Business Gateway

Meeting Date: October 27, 2016

# THE OHIO BUSINESS GATEWAY

## MISSION STATEMENT

MAKE DOING  
BUSINESS IN OHIO  
EASY AND EFFICIENT  
BY PROVIDING  
E-GOVERNMENT  
SERVICES THAT ARE  
SIMPLE AND SECURE

## GUIDING PRINCIPLES

Focus on the **needs of businesses** as the end user

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**Clear customer journey** for starting, managing, and growing a business

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User experience that maximizes **value and efficiency**

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Provide a system of **tools and information** to businesses

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To create an **adaptable, integrated, and secure** digital platform

# STEERING COMMITTEE

## MEETING AGENDA

TOPIC	DESCRIPTION	PRESENTER	TIME
<b>Welcome</b>	Welcome and procedural updates	Lt. Governor Mary Taylor	<b>10 minutes</b>
<b>Operations Update</b>	Provide an update on Ohio Business Gateway operations	Angelo Serra	<b>10 minutes</b>
<b>Gateway Member Spotlight</b>	Opportunities for Ohioans with Disabilities	Jim Miller	<b>10 minutes</b>
<b>Modernization Project Update</b>	Gateway Modernization Project Recap	Paula Steele	<b>45 minutes</b>
	<ul style="list-style-type: none"><li>• Project Terminology</li><li>• Implementation Phase Overview<ul style="list-style-type: none"><li>• Phase I Deep-Dive</li><li>• Phase II Deep-Dive</li></ul></li></ul>	SI Team	
	Gateway Modernization Organizational Change Management	OCM Team	
<b>Open Discussion and Suggestion Box</b>	Open forum to discuss any additional items <ul style="list-style-type: none"><li>• Foster responses for the Suggestion Box, providing attendees the opportunity to share thoughts and bring new ideas to the table for improving the Gateway</li></ul>	OCM Team	<b>10 minutes</b>

# GATEWAY OPERATIONS

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UPDATE

# Topics

- Project Updates
- Usage Updates
- Internal Focus
- Projects in the Pipeline
- Contact Information

# Project Updates

## Maintenance

- Miscellaneous language/messaging and hyperlink changes
- Defect repair to Receipt Display, Scripts
- Improvements to payment cancellation process

## Opportunities for Ohioans with Disabilities

- Update of late penalty rule
- General accessibility updates to User Interface
- Interactive Voice Response (IVR) integration for filing
- Expand Monthly Operational Report (MOR) filing to cover other expenses

## Job and Family Services

- Improve data sharing and company updates between Ohio Means Jobs (OMJ) and Ohio's Workforce Case Management System (OWCMS)

STARS Release 7 Deployment

STARS Release 8 Deployment

# Usage Updates

Gateway Usage (1/1/2016 – 9/30/2016)

- \$9.294B in electronic payments
- \$4.128B in offline payments
- 4,039,059 transactions

# Internal Focus

## Duplicate Payment Detection and Reduction

- Implemented “Duplicate Detection” Process
- Configuration Changes to supporting software
- Final Changes to how Automated Clearing House and Activity Reports are delivered in progress

## Application Performance Monitoring

- Application Performance
  - Real-time information
  - Partially implemented in production
  - Active dashboards being used by Help Desk
- Hardware Performance
  - Implementation in progress

# Projects in the Pipeline

## Upcoming for 2016

- STARS Release 8 “go-live” on October 31<sup>st</sup> – Code Complete
- Web Application Firewall implementation and Advanced Threat Detection “go-live” November/December

## Upcoming for 2017

- STARS Release 9 “go-live” on January 2<sup>nd</sup> – Code Complete
- STARS 9.1 Release “go-live” on April 10<sup>th</sup> – Requirements Gathering
- STARS Release 10 “go-live” on June 27<sup>th</sup>



# Contact Information

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OBG Help:

Phone: **866-OHIO-GOV (644-6468)**

Online: <http://business.ohio.gov/efiling>

# SERVICE PARTNER SPOTLIGHT

## OPPORTUNITIES FOR OHIOANS WITH DISABILITIES

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JIM MILLER

ENTERPRISE APPLICATION AND DATABASE MANAGER

# GATEWAY MODERNIZATION PROJECT

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UPDATE

# PREVIOUSLY DISCUSSED

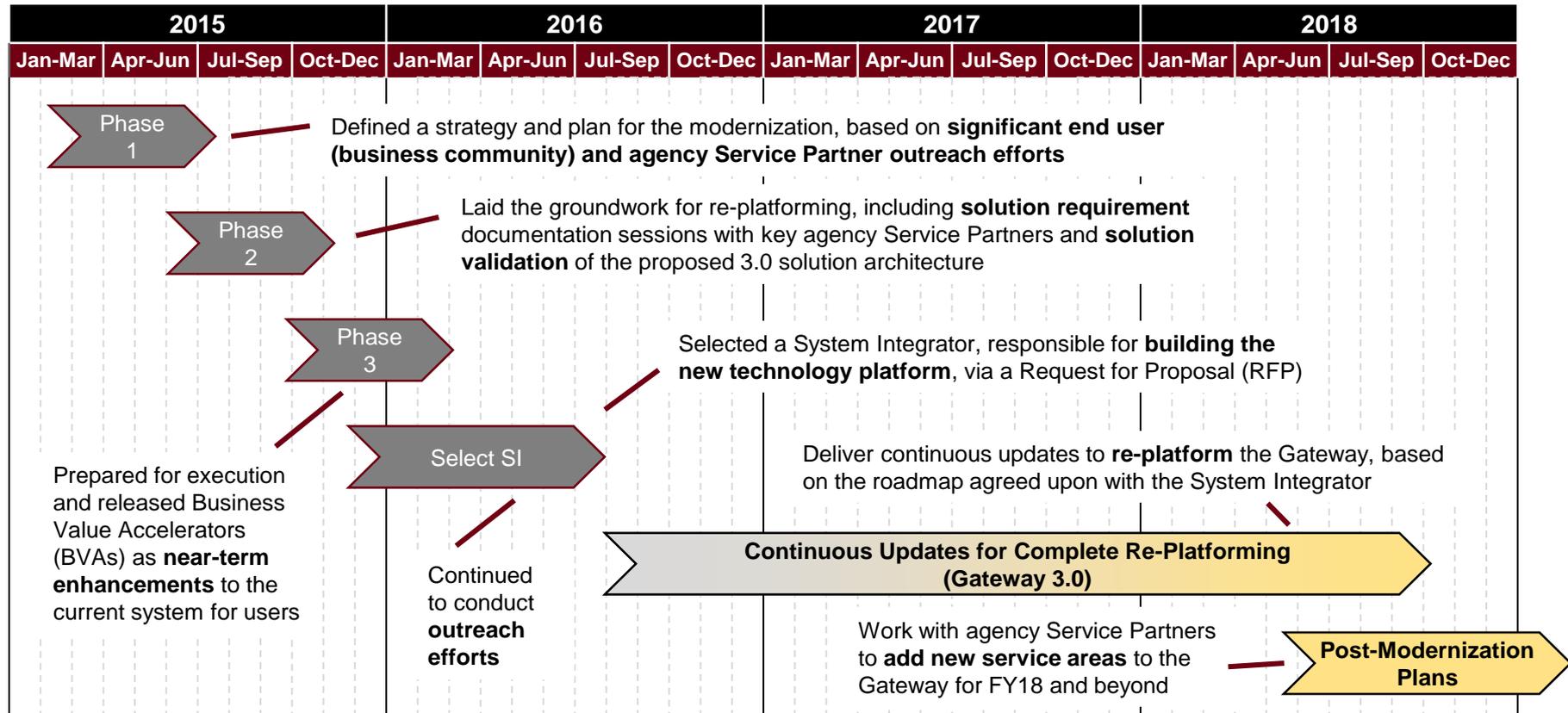
## KEY TOPICS COVERED IN THE LAST STEERING COMMITTEE MEETING

### KEY TOPICS COVERED IN LAST MEETING:

- Provided an update on Gateway operations
- Highlighted recent activities at Deferred Compensation in the Service Partner Spotlight
- Provided an update on the Gateway Modernization Project, the including RFP approach and go-forward planning with Service Partners
  - RFP I: Oct. 2015 – Feb. 2016
  - RFP II: Mar. 2016 – Jul. 2016
- Reviewed the Business Value Accelerators and user outreach effort takeaways
- Reviewed Gateway terms and provided a summary of takeaways from last meeting's "Suggestions Box"

# PROJECT ROADMAP

## HIGH-LEVEL TIMELINE FOR RE-PLATFORMING THE GATEWAY



# GATEWAY MODERNIZATION PROJECT RECAP

PROGRESS TO-DATE



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## STAKEHOLDER ENGAGEMENT

- Touchpoints with Service Partners
- Communication with User Feedback Group



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## PROCUREMENT COMPLETE

- System Integrator (SI) selected



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## TEAM ON THE GROUND

- SI: Accenture
- Project Management (PM): State
- Organization Change Management (OCM): Deloitte



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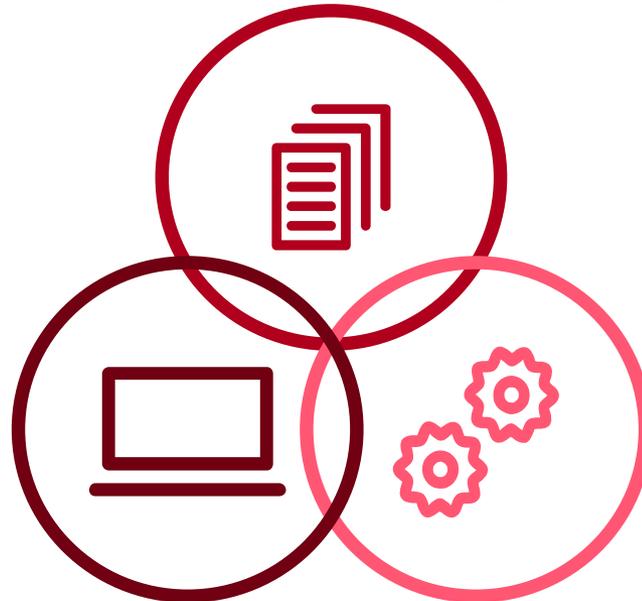
## PROJECT KICK-OFF

- Formal Kick-off conducted
  - Implementation Phase launched in September
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# ROLE OF THE SI

Translate the findings of the strategy work into concrete page layouts and site navigation

Implement the new Gateway front-end on the Salesforce platform



Use the State's enterprise integration solution to increase the long-term flexibility of the Gateway

# WHY ACCENTURE

USER-CENTERED  
APPROACH THAT  
AIMS TO:



- Drive voluntary compliance and reduce compliance enforcement
- Reduce user calls to the help desk
- Reduce, if not eliminate, an upfront investment in end-user training

UNPARALLELED  
SALESFORCE  
EXPERIENCE

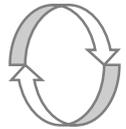


- 8 out of 10 of the largest Salesforce implementations in 2015
- 6 out of 10 of the largest ever Service Cloud implementations

# PROJECT TERMINOLOGY

The Gateway Modernization project uses a “hybrid” agile project delivery approach

- Analysis and testing is performed holistically (waterfall)
- Design, build and unit test is performed iteratively (agile)

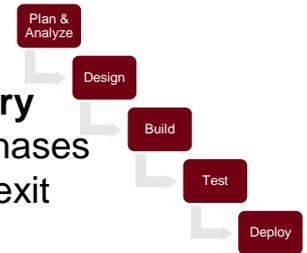


## Agile Delivery

- Iterative development
- Define Stories / Requirements in Plan and Analyze
- Sequence Stories into Sprints for iterative builds

## Waterfall Delivery

- Sequential phases
- Phase entry/exit

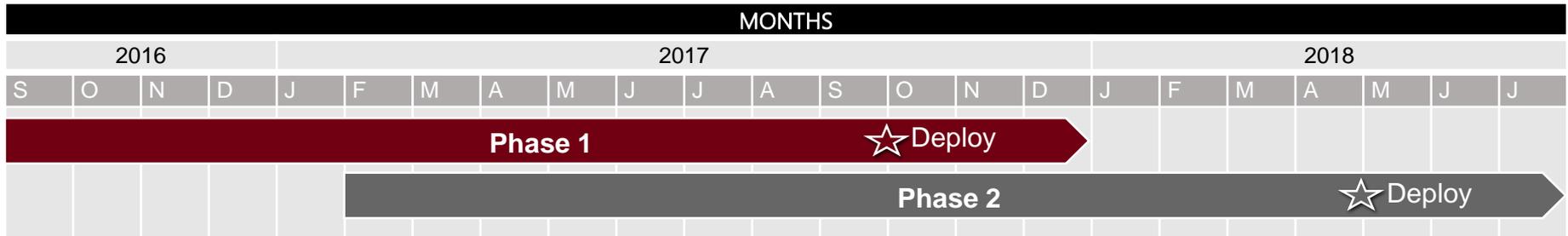


## KEY TERMS

Business User	Business-specific end users of the Gateway
Service Provider	CPAs and other 3 <sup>rd</sup> party service provider users of the Gateway
Service Partner	Agencies that have joined with the Gateway to offer electronic filing services for selected regulatory and compliance activities
Enterprise Service Bus (ESB)	Back-end technology that enables improved integration between the Gateway and Service Partner systems
User Stories	<ul style="list-style-type: none"> <li>• Defines requirements</li> <li>• Features that can be implemented within a single sprint</li> </ul>
Sprint	A set period of time during which specific User Stories are completed and made ready for review

# IMPLEMENTATION PHASE OVERVIEW

## OUTCOMES & BENEFITS



### PHASE 1

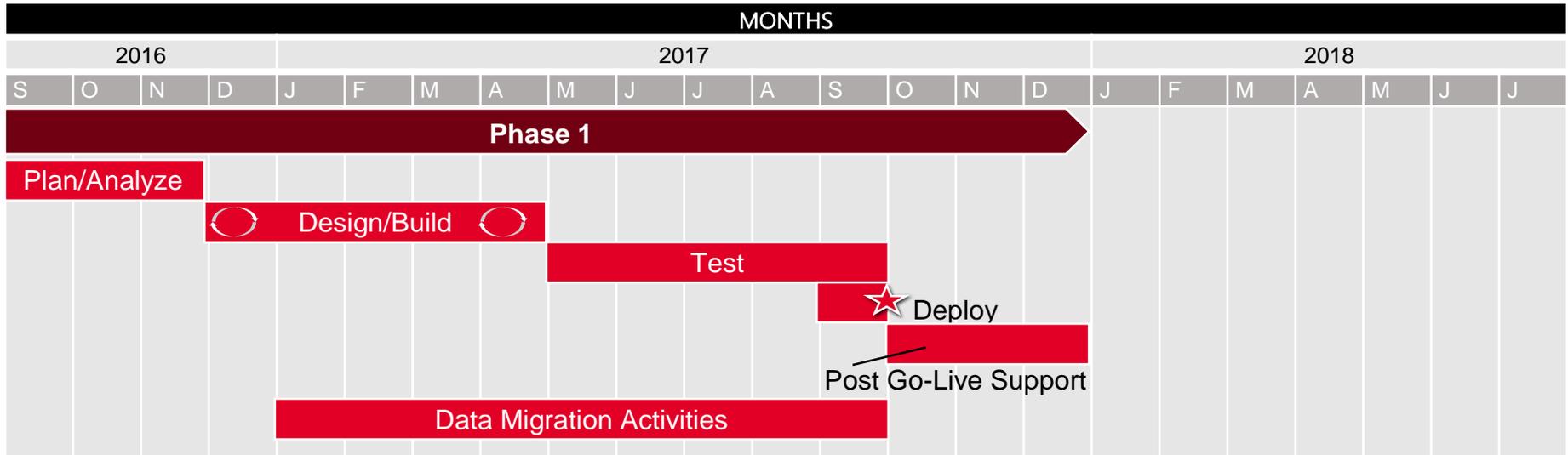
- **Outcome:** Replace Gateway front-end
- **Benefit:** Improved Business User experience
  - Modernized look and feel
  - Streamlined navigation
  - Simplified path to complete filings
  - Ability to file online service requests

### PHASE 2

- **Outcome:** Replace Gateway back-end
- **Benefit:** Increased flexibility to incorporate new/modified Service Partner requirements
  - Simplified process to add new transactions
  - Improved system performance

# PHASE 1 DEEP-DIVE

## KEY DATES & SERVICE PARTNER INVOLVEMENT



### KEY DATES

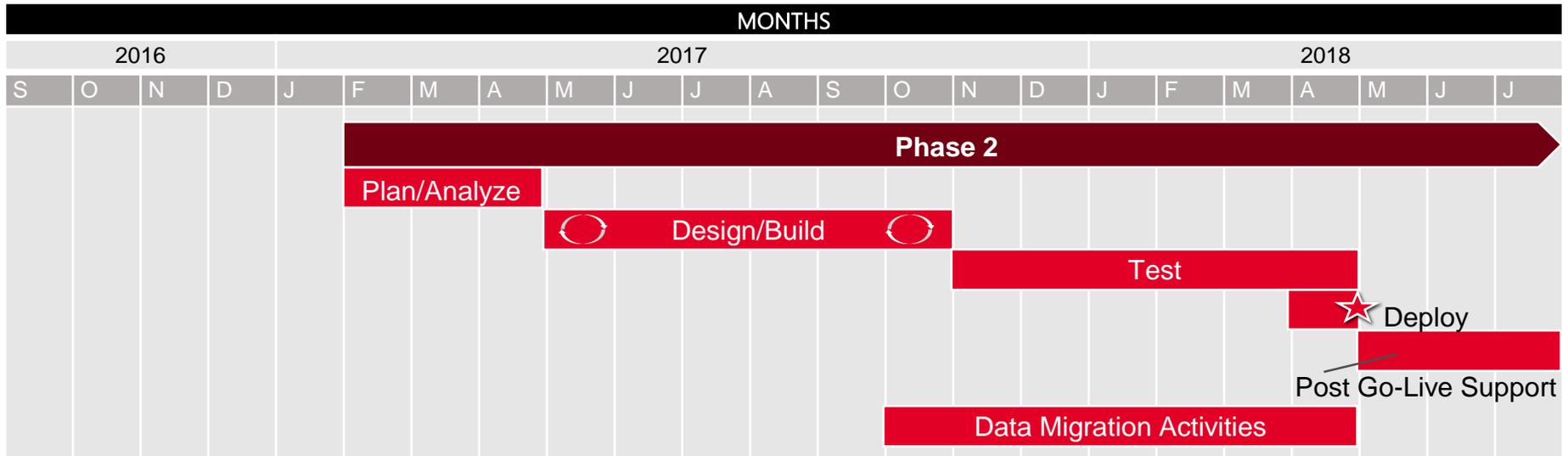
- Go-live Oct. 1, 2017
- 90 day plan/analyze phase (Sept. – Dec. 2016)
- Five 4-6 week sprints (Dec. 2016 – Apr. 2017)
- Acceptance testing (Jul. – Aug. 2017)

### SERVICE PARTNER INVOLVEMENT

- Participate in requirements gathering
- Provide feedback and support unit testing during sprints
- Perform acceptance testing

# PHASE 2 DEEP-DIVE

## KEY DATES & SERVICE PARTNER INVOLVEMENT



### KEY DATES

- Go-live Apr. 2018
- 90 day plan/analyze phase (Feb. – Apr. 2017)
- Three 7-8 week sprints (Mar. – Oct. 2017)
- Acceptance testing (Feb. – Mar. 2018)

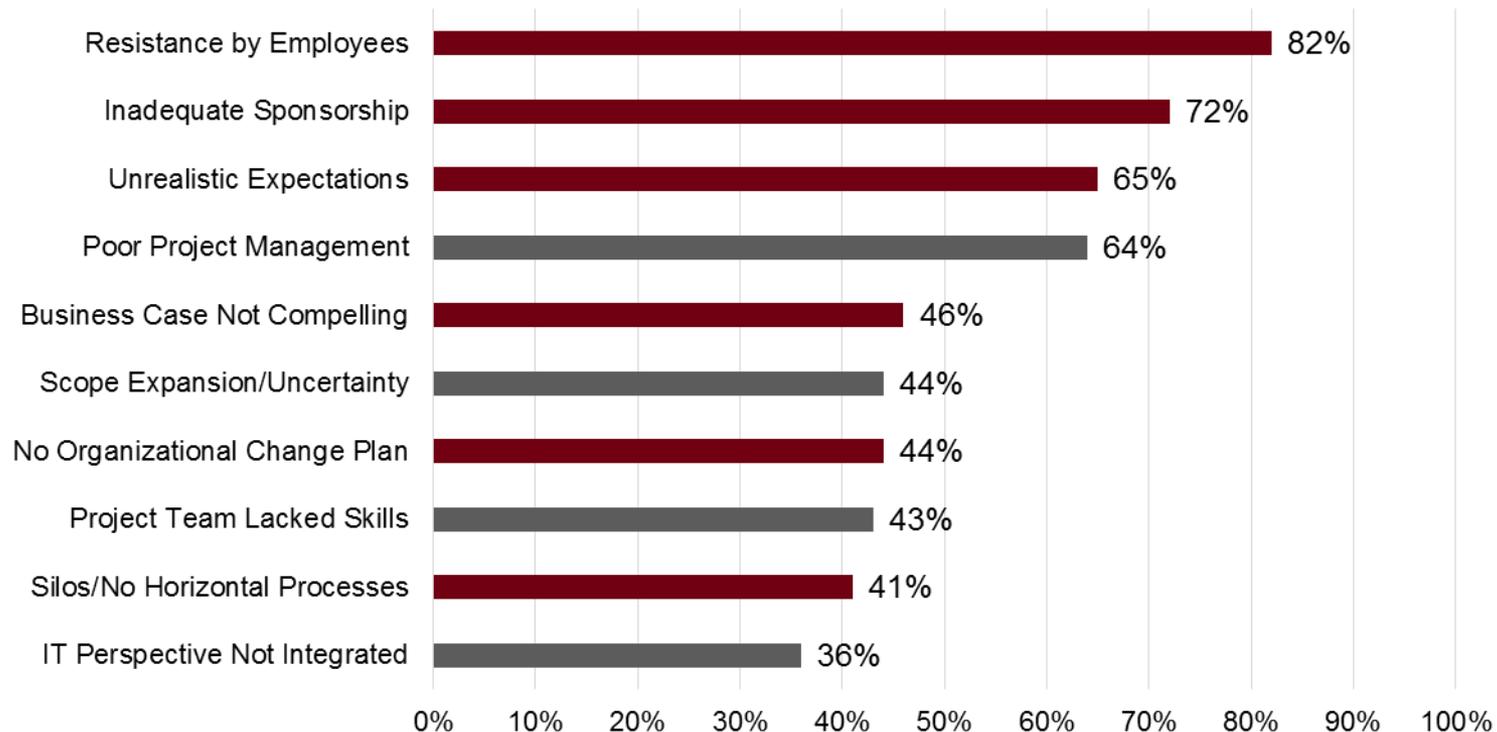
### SERVICE PARTNER INVOLVEMENT

- Participate in requirements gathering
- Provide feedback and support unit testing during sprints
- Perform acceptance testing
- Configure systems to communicate with ESB

# THE IMPORTANCE OF OCM

## CHANGE MANAGEMENT ADDRESSES COMMON CHALLENGES TO TECHNOLOGY MODERNIZATION PROJECTS

### WHY DO TRANSFORMATIONS FAIL?



Source: Deloitte CIO Survey

Note: Maroon shading indicates the people related causes of unsuccessful transformations

***Addressing risks to adoption is crucial to the success of any large-scale transformation***

# GATEWAY MODERNIZATION PROJECT OCM GOALS

## ENGAGE, INFORM & PREPARE

-  Engage stakeholders early to understand how best to keep them informed of project progress and ready for Day 1
-  Develop targeted and focused messaging relevant to stakeholders' interests and needs
-  Communicate with one voice to clearly relay the vision, strategy and benefits of the modernized Gateway
-  Keep stakeholders consistently informed, involved and aligned to Gateway Modernization progress
-  Prepare and generate enthusiasm among Gateway Business Users, Leadership and Service Partners for changes to the Gateway

# GATEWAY MODERNIZATION PROJECT OCM ACTIVITIES

OUR PLAN TO PREPARE STAKEHOLDERS FOR DAY 1

WORK AREA	KEY ACTIVITIES
 <p>GATEWAY OCM APPROACH DEVELOPMENT</p>	<ul style="list-style-type: none"><li>• Develop and execute the Stakeholder Engagement Plan and Day 1 Readiness Approach to provide a <b>roadmap for Gateway OCM strategies, tactics and activities</b></li></ul>
 <p>GATEWAY BUSINESS COMMUNITY AWARENESS, DESIGN INPUT AND LAUNCH READINESS</p>	<ul style="list-style-type: none"><li>• Design and implement “early experience” workshops to better <b>inform the design of user facing elements</b> of the modernized Gateway</li><li>• Design and execute the Business User Communications Plan to provide Business Users with <b>insight</b> into the <b>direction, impact and materiality</b> of Gateway changes, as well as an understanding of the <b>positive impact</b> these changes will have on them</li><li>• Develop a “Day 1 readiness” primer and other communication material concepts to <b>demonstrate how to conduct business</b> in the modernized Gateway</li></ul>
 <p>STATE CHANGE MANAGEMENT AND LAUNCH READINESS</p>	<ul style="list-style-type: none"><li>• Define and communicate <b>awareness</b> items and <b>system and process changes</b></li><li>• Design and develop Day 1 readiness tools and materials to <b>prepare State personnel</b> who operate, manage or utilize the Gateway for <b>performing their job functions on Day 1</b></li></ul>

# OPEN DISCUSSION & SUGGESTIONS

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SUGGESTION BOX

# DISCUSSION & SUGGESTIONS

## STEERING COMMITTEE AND STAKEHOLDERS

- Are there any questions or recommendations?
- Any additional items that should be discussed as a group?
- The suggestion box is provided for any additional ideas to incorporate

# NEXT STEPS

LOOKING AHEAD FOR KEY 90 DAY ACTIVITIES

## KEY GATEWAY MODERNIZATION PROJECT NEXT STEPS

- Complete requirements validation and gathering
- Design/Build phase begins
- Establish future-state page layouts and site navigation
- Stakeholder Engagement Plan & Day 1 Readiness Approach complete

**THANK YOU!**