

# OHIO BUSINESS GATEWAY

Steering Committee Meeting

October 9, 2015

# OBG STEERING COMMITTEE

## MEETING AGENDA

Topic	Time	Objective	Components
Introductions	20 min	<ul style="list-style-type: none"><li>▪ Welcome by Lt. Governor Mary Taylor</li><li>▪ Accept prior Steering Committee meeting minutes</li><li>▪ Introduce a new format for Steering Committee member roll-call</li></ul>	<ul style="list-style-type: none"><li>▪ Let's Talk Gateway</li></ul>
OBG Operations	10 min	<ul style="list-style-type: none"><li>▪ Provide an update on the current state of OBG operations</li></ul>	<ul style="list-style-type: none"><li>▪ Operations Update</li></ul>
OBG Modernization Project	60 min	<ul style="list-style-type: none"><li>▪ Recap key activities, milestones, and progress made related to the modernization project since the last Steering Committee meeting</li></ul>	<ul style="list-style-type: none"><li>▪ Business Value Accelerators</li><li>▪ Governance Model</li><li>▪ Communications</li><li>▪ Solution Validation</li><li>▪ Competitive Dialogue</li></ul>
Next Steps	10 min	<ul style="list-style-type: none"><li>▪ Establish key next steps related to the modernization project and Ohio Business Gateway</li></ul>	<ul style="list-style-type: none"><li>▪ Upcoming Areas of Focus</li></ul>
Open Discussion and Suggestion Box	20 min	<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>	<ul style="list-style-type: none"><li>▪ Suggestion Box</li></ul>

# LET'S TALK GATEWAY

## STEERING COMMITTEE MEMBERS

### 3 Things

#### Public Sector

- Your name
- Your role and the name of your agency / entity
- Key services your agency / entity offers on the Gateway

#### Business Community

- Your name
- Your role and the name of your firm / company
- Primary services you utilize on the Gateway

# OBG OPERATIONS

Update

# Topics

- Project Updates
- Usage Updates
- Projects in the Pipeline

# Project Updates

- August Release
  - Payment processing updates
  - Universal coupons for IFTA
- September Release
  - New Motor Fuel Tax
- October Release
  - Internal performance enhancements
- October 24<sup>th</sup> Release
  - Security upgrades for horse racing
  - Refunds for Motor Fuel

# Project Updates Continued

- System wide
  - Resolved payment processor stability issues.
  - Eligibility file updates for Sales Tax and Withholding accounts
  - History merge tool
  - System configuration changes for better stability of applications (Application pools)

# Usage Updates

- OBG Usage 2014
- **\$9.5 Billion** collected
  - 21% increase over 2013
- **3.6 million** filings
  - 19% increase over 2013
  
- OBG Usage 2015 (1/1/2015 – 9/30/2015)
- **\$ 7.71 Billion** Collected
- **3.83 million** Filings

# Projects in the Pipeline

- Pipeline
  - IFTA – create Universal Payment coupons
  - Preparation for migration of Commercial Activity Tax to STARS system in 2016 (Release 7)
  - W2 / 1099 file upload service (IT-3)
  - Business Value Accelerators
- Internal Focus :
  - Upgrade to latest version of Team Foundation server.



# Contact Information

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OBG Help:

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

Online: **business.ohio.gov/efiling**

# OBG MODERNIZATION

Project Update

# MISSION STATEMENT WITH TEETH

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

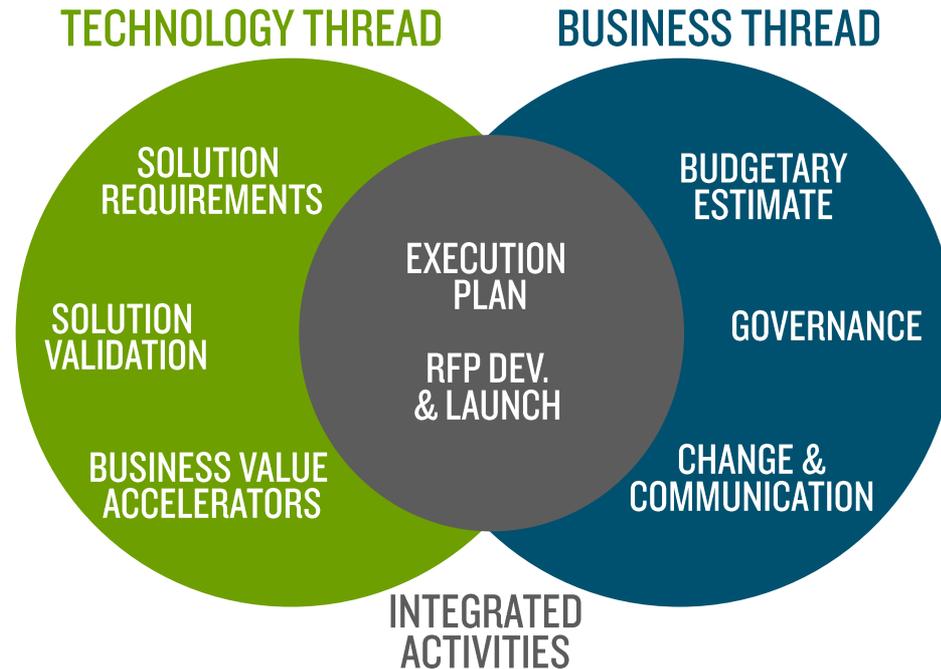
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To create an **adaptable, integrated, and secure** digital platform

# Project Overview

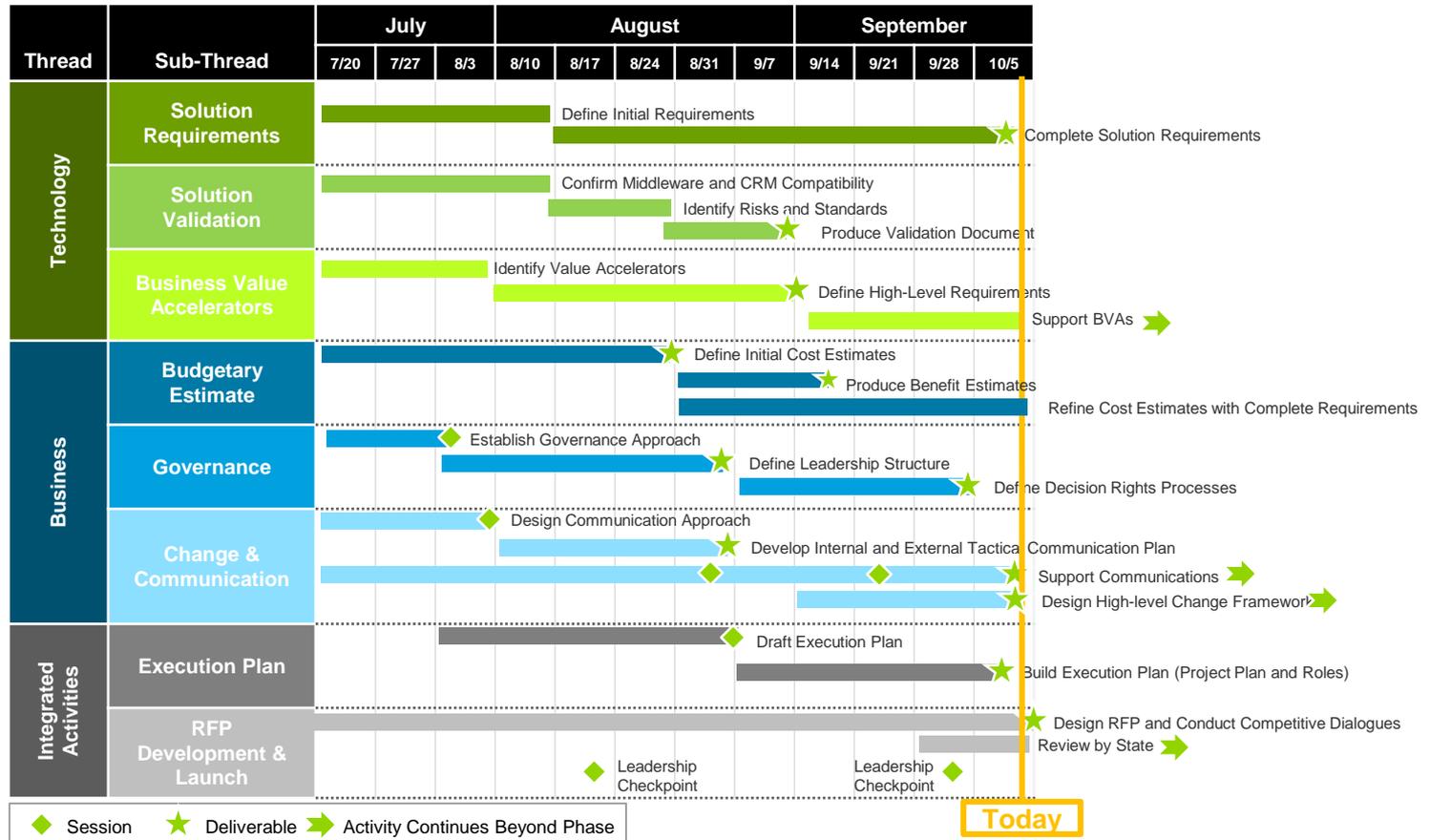
# PHASE 2 WORK THREADS

COLLABORATING ACROSS THREADS TO DRIVE PROGRESS



# PROJECT TIMELINE

## WRAPPING UP PHASE 2



# Solution Requirements

# PROGRESS UPDATE

## FROM PHASE 2 WORKING SESSIONS

Entity Name
Ohio Business Gateway (OBG)
Ohio Department of Taxation (ODT)
Municipal Taxation and Help Desk
Bureau of Workers' Compensation (BWC)
Ohio Department of Job and Family Services (ODJFS)
Opportunities for Ohioans with Disabilities (OOD)
Ohio Deferred Compensation
Department of Administrative Services (DAS)
Ohio Department of Commerce

What We've Heard
<ul style="list-style-type: none"><li>Streamlined and simplified account registration process will be a great value add for users and agencies</li><li>A few agencies expressed a need for one-time users to file transactions and process payments without being a registered user</li><li>Most agencies are looking forward to leveraging shared service offerings planned for the future OBG solution (e.g. single sign-on, payment processing, verification services, etc.)</li><li>General feedback around a need to save banking information would be great win for users, as it would increase usability and avoid payment related errors</li><li>An advanced Business Process Management application has been identified as a need to support complex processes between OBG and agency applications</li><li>Multiple agencies have identified a need for a streamlined, user-facing, bulk upload capability for registrations and transactional filings</li><li>A few agencies expressed a need for multi-lingual capabilities for customer service functional areas (e.g. IVR, Live Chat, Web Self-Service)</li><li>Most agencies expressed a need to move towards paperless correspondences (e.g. sending email notifications of certified notices that are available and secure)</li></ul>

# Business Value Accelerators

# VALUE ACCELERATORS

## ENHANCING THE USER EXPERIENCE IN THE SHORT-TERM

### 4 BUSINESS VALUE ACCELERATORS (BVA)

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#### 1 REFRESHED DESIGN ON SELECT PAGES

Navigate and find key information more efficiently on updated Home, Splash and Access pages



#### 2 USER ACCOUNT COMMUNICATIONS

Users can more easily understand the type of account that is necessary, and how to set up rights for that account



#### 3 PASSWORD MODERNIZATION

Change and reset passwords more simply, all within the Ohio Business Gateway

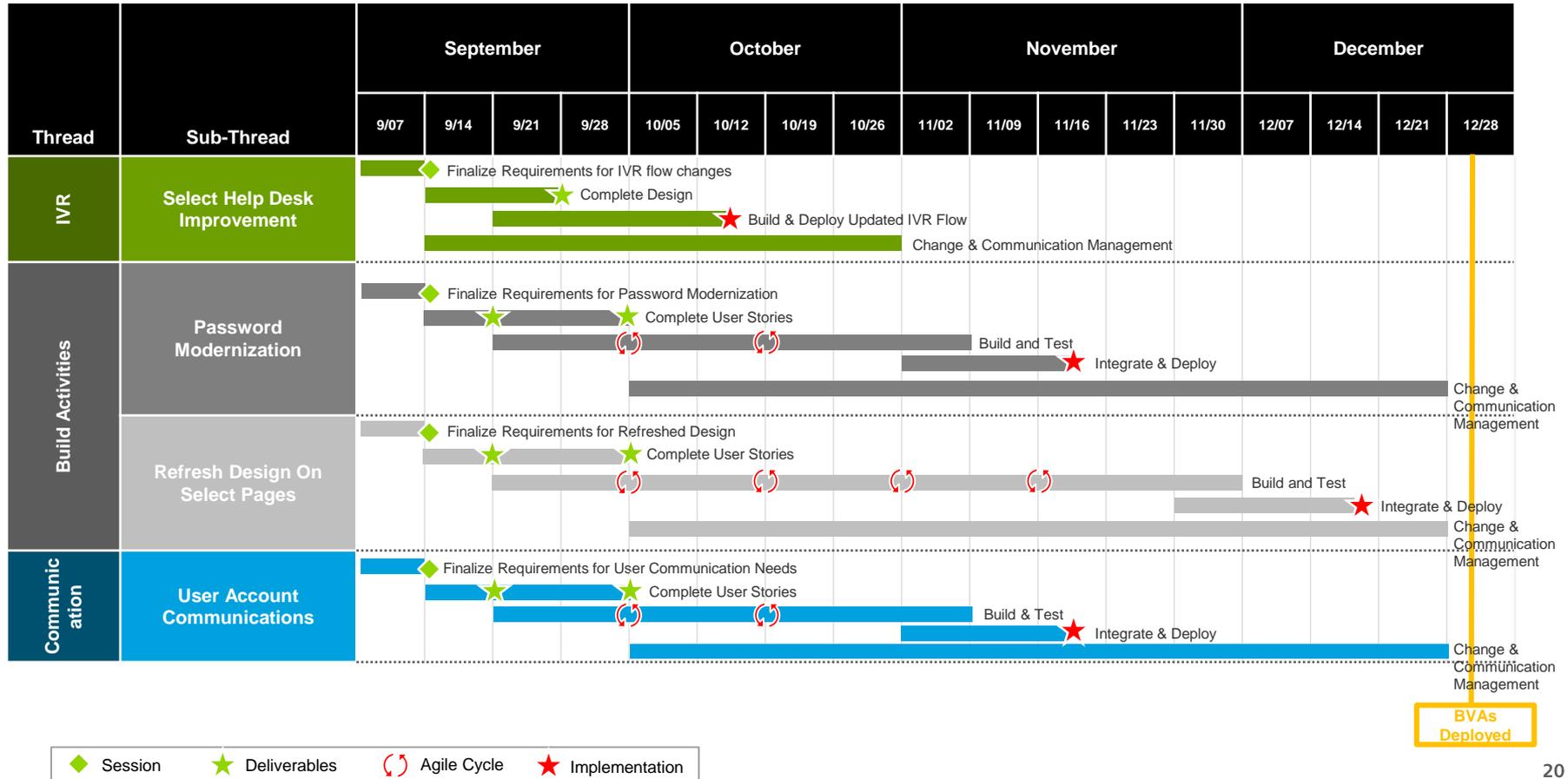


#### 4 SELECT HELP DESK IMPROVEMENT

Clearly know where to turn when asking questions and resolving issues, routing the user to the right answer quicker

# BVA DELIVERY TIMELINE

Identified Business Value Accelerators can be delivered by Christmas and enhance functionality for January '16 filings



Governance

# DECISION TOPICS

## STARTING WITH THE KEY DECISIONS TO IDENTIFY THE RIGHT STRUCTURE

### DECISION TOPICS

#### Plan

- Long-Term Strategy
- Policy Impact
- Change & Release Control

#### Finance

- Investment & Funding
- Budget Allocation

#### Technology & Operations

- Security
- Technical Service Selection
- Reporting
- Operating Plan

#### Agency & Municipality

- On-Boarding
- Service Addition
- Service Change

#### Features & Offerings

- Roadmap
- Initiative Definition & Prioritization
- Feature Modification

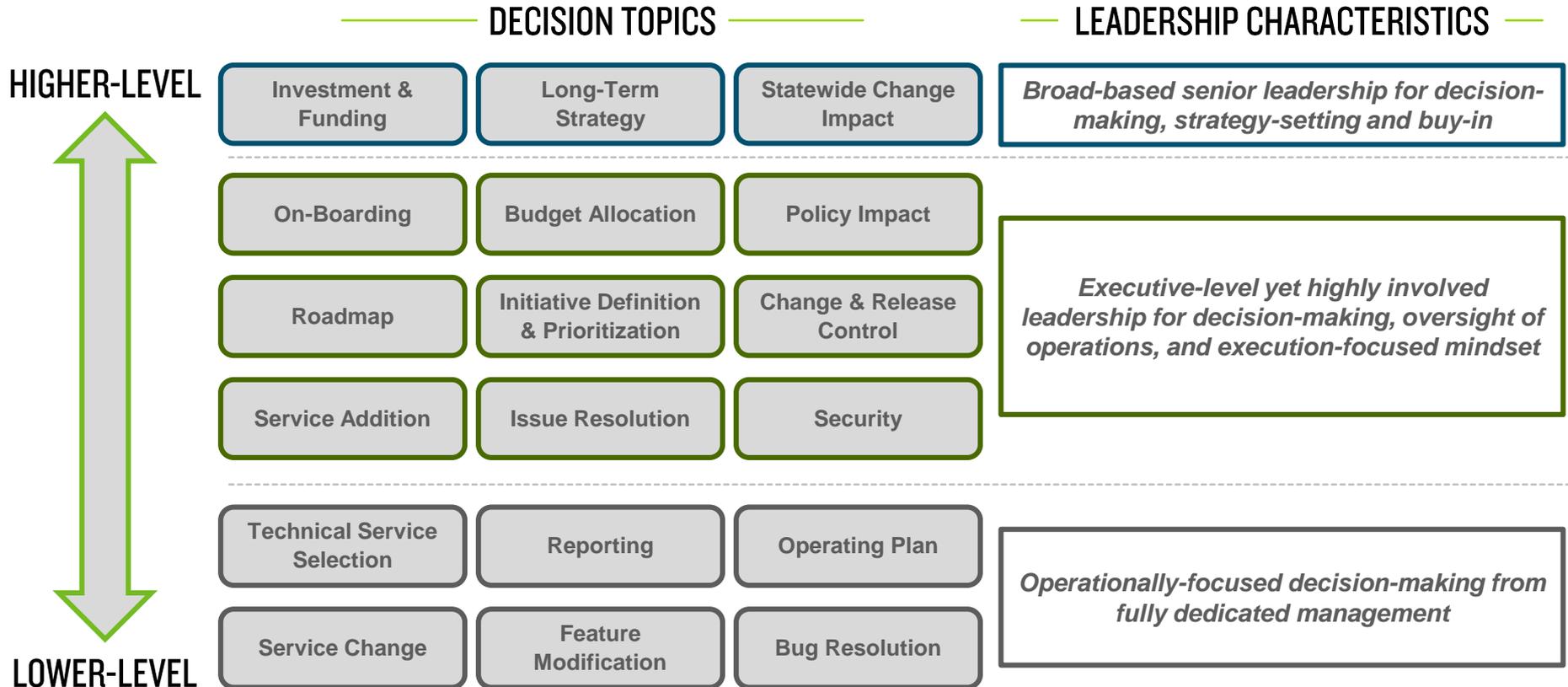
#### Issue & Risk

- Statewide Change
- Issue Resolution
- Bug Resolution

Each topic requires the right level of involvement of key decision-makers

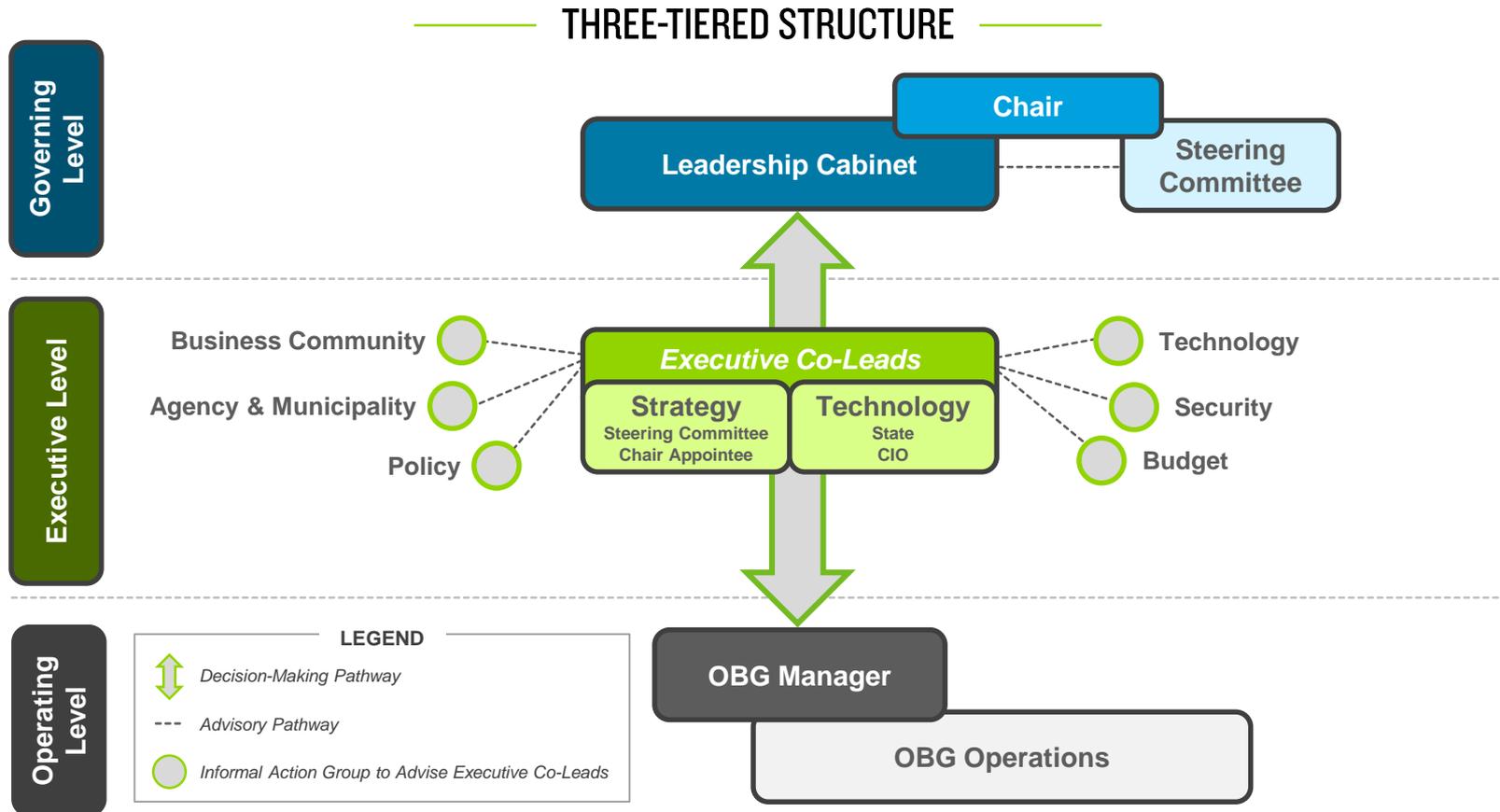
# LEVELS OF DECISION-MAKING

LEADERSHIP CHARACTERISTICS AND DEMANDS VARY BY LEVEL



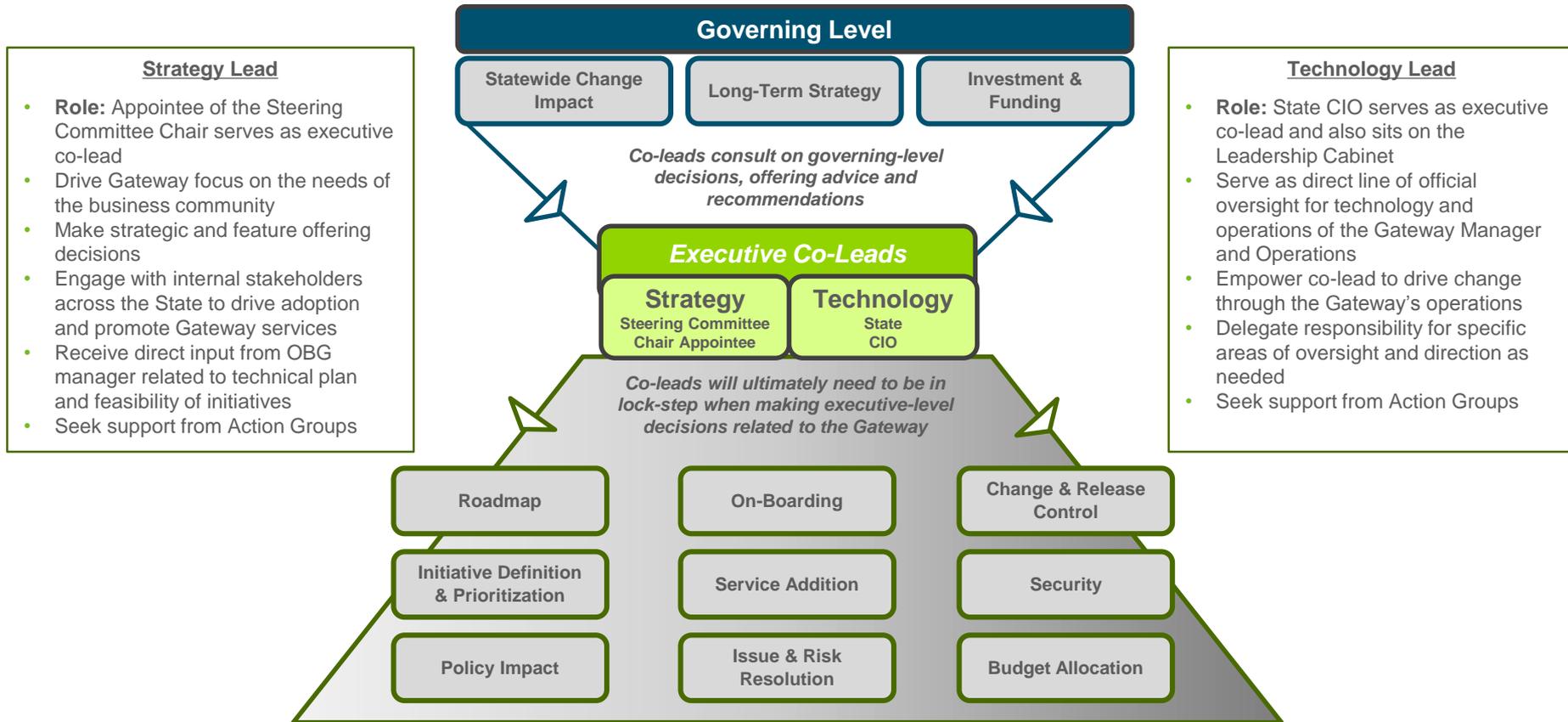
# LEADERSHIP STRUCTURE

A CLEAR, FORMALIZED PATHWAY FOR DECISIONS IS CRUCIAL



# EXECUTIVE CO-LEADS

## EXECUTIVE-LEVEL DECISIONS ARE MADE IN PARTNERSHIP

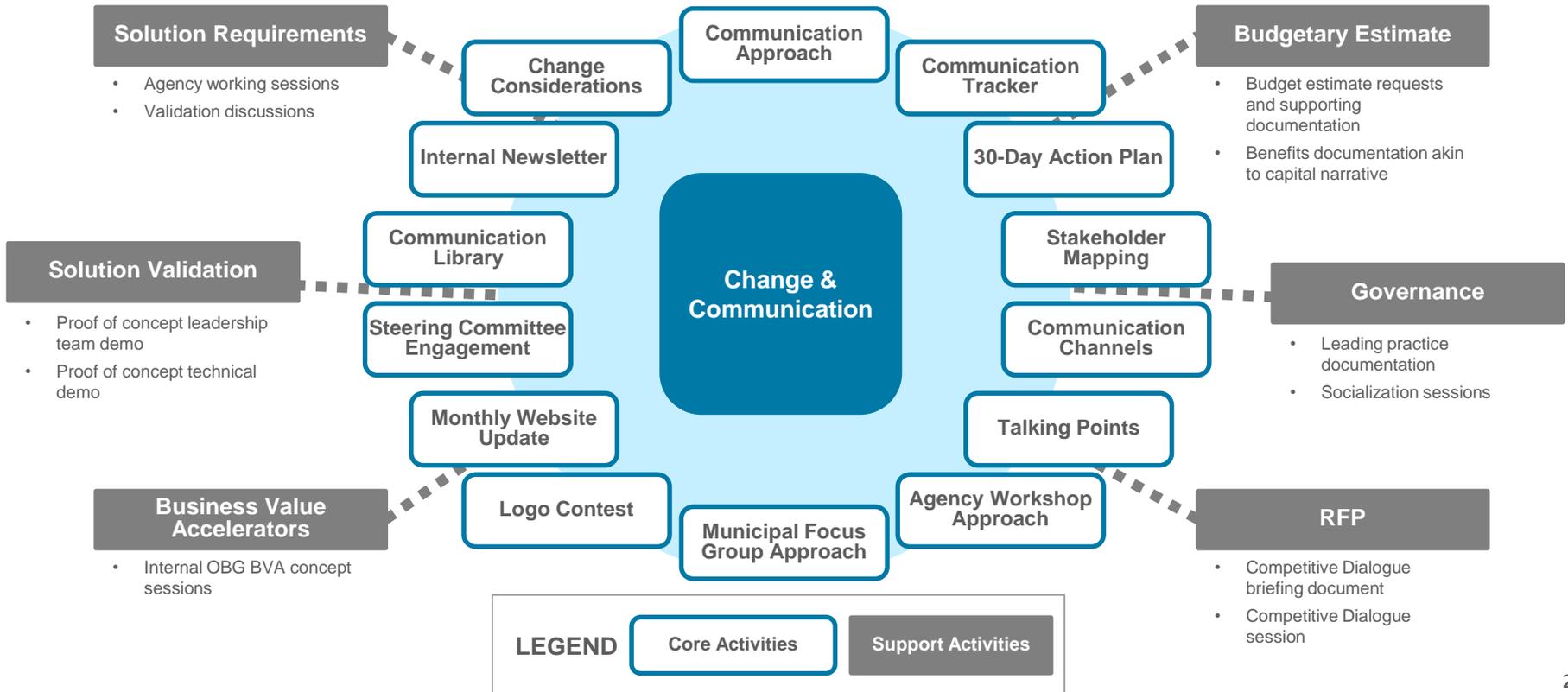


Communications

# A COMMUNICATIONS HUB

## PROVIDING SUPPORT ACROSS THE OBG 3.0 PROGRAM

### OBG 3.0 COMMUNICATIONS



# 30 DAY ACTION PLAN

## KEY COMMUNICATION FOCUS AREAS FOR THE NEXT 30 DAYS

	Communication	General Description
Core	Monthly Website Update	<ul style="list-style-type: none"> <li>Provide monthly updates via the OBG website</li> </ul>
	Internal Newsletter	<ul style="list-style-type: none"> <li>Institute a newsletter providing updates on the modernization effort to internal stakeholders</li> </ul>
	Logo Contest	<ul style="list-style-type: none"> <li>Create a new logo for the OBG, featuring a contest</li> </ul>
	Communication Library	<ul style="list-style-type: none"> <li>Manage files and organize documents so they are readily available to core team members</li> </ul>
	Municipal Focus Group	<ul style="list-style-type: none"> <li>Conduct a municipal focus group session to layout the vision for the Gateway and drive ultimate adoption</li> </ul>
	Agency Workshop	<ul style="list-style-type: none"> <li>Conduct an internal "Tier 1" agency communication workshop to provide an update on the modernization and discuss key considerations</li> </ul>
	Steering Committee Engagement	<ul style="list-style-type: none"> <li>Conduct the Steering Committee (SC) meeting, incorporating new engagement principles to drive enhanced stakeholder engagement</li> </ul>
	External Engagement	<ul style="list-style-type: none"> <li>Drive social media and other channels to engage end users of the Ohio Business Gateway and keep them informed of upcoming changes to the system</li> </ul>
Support	RFP Announcements	<ul style="list-style-type: none"> <li>Support external communications related to the RFP</li> </ul>
	BVA Announcements	<ul style="list-style-type: none"> <li>Support communications related to the Business Value Accelerators (BVAs)</li> </ul>

# COMMUNICATIONS

## STEERING COMMITTEE AND STAKEHOLDERS

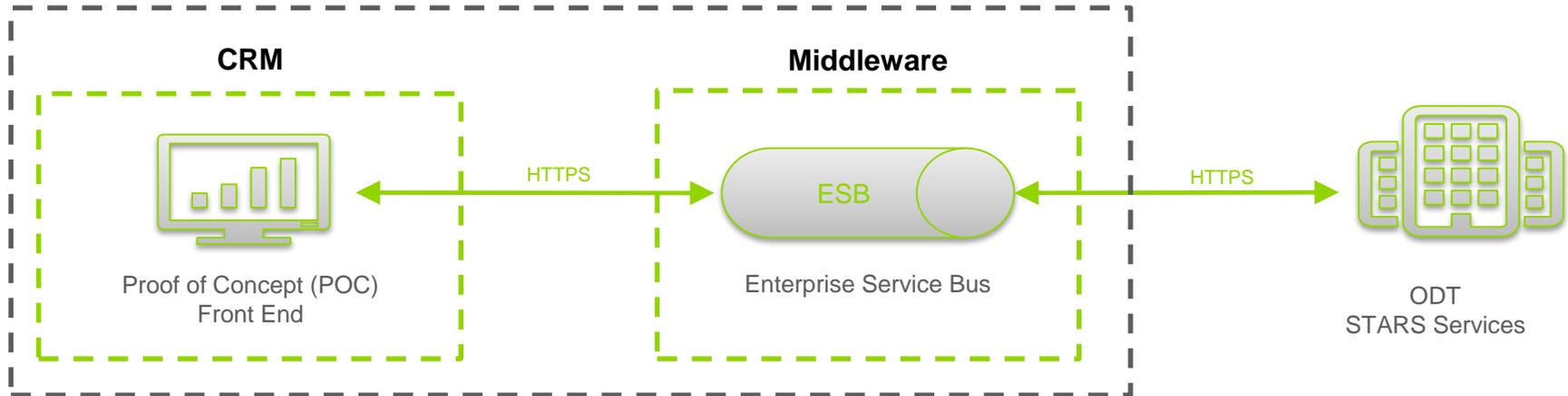
**Are there any additional communication channels and mechanisms that we should be pursuing related to the Gateway modernization?**

# Solution Validation

# SOLUTION VALIDATION

## PROOF OF CONCEPT AND DEMOS

### SOLUTION VALIDATION DESIGN



### ACTIVITY SUMMARY

- Created a test architecture with ODT Stars System
- Leveraged on-cloud CRM for front-end application and on-premise middleware, as key solution components
- Replicated *as-is* Severance Tax filing process, to validate connectivity, data exchange and the ability to complete filing process
- Conducted live demos of the proof of concept for both project leadership and technical teams

# KEY FINDINGS

## LEARNINGS FROM THE SOLUTION VALIDATION PROCESS

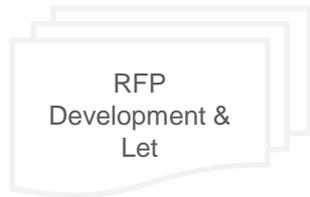
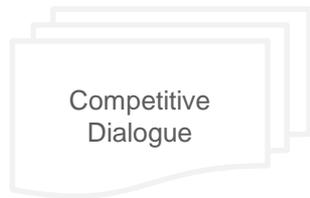
- Agency systems, specifically the STARS system, is **compatible** with proposed **future OBG architecture**
- The proposed future architecture will be able to **support** the majority of backend **agency integrations**, without making any significant changes\* to respective agency systems
- Existing **security protocols** need to be revalidated during future design, to ensure alignment with industry best practices
- **Adequate** and **up-to-date documentation** is necessary to avoid incorrect assumptions and will significantly contribute to a robust future OBG solution design
- Agency systems **stability, availability, and performance** is essential for development, testing, and the user experience of future OBG solution
- Real-time **monitoring** and **debugging** tools are required for support team to identify and resolve issues easier and faster
- Greater reusability can be achieved by **defining common frameworks** across application, integration and middleware solution components, to reduce development, testing, and bug resolution efforts

\* Additional technology consideration and evaluation may be required during foundation phase, to address architectural needs

# Competitive Dialogue

# PROCUREMENT

## CURRENT TIMELINE FOR NEW SOLUTION SELECTION



### Timing: Conducted in September 2015

**Purpose:**

State presented additional details as to current situation, goals and directions as well as to highlight the characteristics of known opportunities and challenges, and solicited feedback and questions from the vendor community

**Participants:**

- State Leadership Team
- Master Integrator
- Eminent Systems Integrators (Leads)
- State prominent technology vendors (Leads)  
(as a group, open discussion)

### Timing: Likely October 2015

**Purpose:**

State to potentially issue an RFP, including the necessary solution requirements, to the vendor community and support an inquiry period

**Participants:**

- State Leadership Team
- Master Integrator
  
- *Vendors respond based on ability to address State's requirements*

### Timing: Likely November – December 2015

**Purpose:**

Following the potential RFP issuance, receive responses, evaluate them, and engage in negotiations with the selected vendor(s) for the implementation of the solution

**Participants:**

- State Leadership Team
- Master Integrator
- State Procurement and Evaluation Team

# COMPETITIVE DIALOGUE

## WHAT WAS ACCOMPLISHED

The State shared information with eminent Systems Integrators and Technology vendors, and allowed vendors to ask questions, in order to:

- ✓ Identify successful approaches to realizing the goals and outcomes based on other Public Sector successes
- ✓ Understand the “state of the art” for achieving the goals and vision outlined in this brief
- ✓ Identify and understand “lessons learned” and common pitfalls
- ✓ Lay the groundwork for roadmap and inform the State's thinking as to the possible implementation of this roadmap (e.g., opportunity, investment model, approach, timeline, standards, change management)
- ✓ Understand the technology and implementation options and marketplace direction

This process was **not** designed to:

- ✗ Specify or determine unique or vendor specific requirements
- ✗ Determine specific Systems Integrators or technologies that will form the State’s requirements
- ✗ Circumvent any open market procurement activity or position any vendor at an advantage to the marketplace

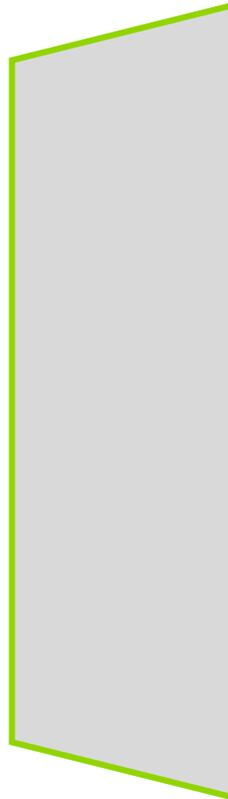
**Over 30 representatives from over 20 distinct vendors attended the Competitive Dialogue**

# FUTURE STATE

## KEY OUTCOMES AND FUTURE CAPABILITIES

### Guiding Principles and Outcomes

1. Establish a unified front-end experience for business users who interact with the State through the OBG, as opposed to moving between various environments
2. Design and implement a clear customer journey for business users to navigate through the lifecycle of starting, managing, and growing a business
3. Decrease the amount of time business users spend on compliance with the State, while increasing accuracy of data and timeliness of submission
4. Extend beyond financial and compliance transactions to include value-additive tools and information to businesses operating in the State (e.g., how to start a business)
5. Implement an architectural solution that is adaptable and scalable between differentiated back end systems (e.g., ODT-STARS, OOD-BEAMS), while ensuring the highest level of security



### Conceptual Grouping of Future Capabilities

Authentication & Authorization
Transaction (Filings) Processing
Workflows and Application Management
Customer Service Management
Analytics and Reporting
Bulk Data Processing & Management
External and Agency Systems Integration
Security, Controls & System Dependability
Audit & History Tracking

# NEXT STEPS

And the Suggestion Box

# NEXT STEPS

## FOR COMPLETING PHASE 2

### Immediate Next Steps

- Prepare for execution of Business Value Accelerators
- Activate the Governance Model
- Continue execution of 30 Day Communications Action Plan
- Complete and finalize RFP and release to Procurement
- Complete Execution Plan

### Key Upcoming Dates

- End of this Master Integrator Phase today
- Release RFP in October

# DISCUSSION & SUGGESTIONS

## STEERING COMMITTEE AND STAKEHOLDERS

**Please share your thoughts and bring new ideas to the table for improving the Gateway, both today and for the re-platformed solution in the future**