
Digital Strategy & Roadmap

Colorado WIC

FORUM ONE™

Confidential | v. 1 | Q4 2020

Table of Contents

<u>Executive Summary</u>	3
<u>Context</u>	4
<u>Unifying Vision</u>	8
<u>Goals, ROI, & Priorities</u>	10
<u>Digital Priorities</u>	14
<u>Digital Ecosystem</u>	47
<u>Service Blueprint</u>	58
<u>Strategy Governance</u>	60
<u>Roadmap</u>	66
<u>Budget</u>	75
<u>Appendix</u>	84

Reimagining an Agile, Client-centered Digital Ecosystem

In order for the Colorado WIC Program to undertake a digital transformation that places the clients it serves at the center of its digital ecosystem—while also optimizing for administrative efficiency and keeping an eye towards sustainable and scalable growth—WIC staff and their digital champions need to prioritize the following:

- Client Tools
- Automation & Efficiency
- Training & Knowledge Management
- Content Strategy
- Feedback

These priorities address the platforms, processes, and people needed to meet the goals of modernizing the WIC digital experience (without diminishing the value of in-person engagement), increasing focus on clients, and becoming a more nimble organization. The key principles behind the aforementioned priorities and corresponding recommendations are to remain client-centered, while focusing on integration, accessibility, flexibility, scalability, and security.

Context

The current client experience is full of barriers that prevent ongoing program engagement.

- Clients expect a modern experience when managing appointments
- Clients and staff want a unified place to manage pre-appointment tasks
- Shopping experience presents many challenges, especially with the WICShopper app
- ColoradoWIC.gov isn't organized for client needs
- Clients are generally open to digital as a part of their WIC experience

Siloed systems provide an inefficient foundation for the WIC program to act as agile as necessary to best serve its clients.

- Manual processes eat away at valuable time
- Compass as the data hub limits adaptability
- ColoradoWIC.gov isn't easy to navigate

There is a gap in intentional change management, although staff are open to digital approaches, especially when it means making their work more efficient.

- Staff feel informed of changes, but are overloaded with information
- Staff need to understand the case for change and be given support
- ColoradoWIC.gov isn't suited for staff needs
- Limited formal training for critical technical job functions

Unifying Vision

Colorado WIC's reimagined digital ecosystem needs to **shift its current center of focus** from government compliance **to the clients it serves**. Focusing the people, processes, and platforms on **increasing the value of the client experience** will lead to an equitable, accessible, and scalable program that clients can trust.

Goals, ROI, & Priorities

Strategic Goals & Outcomes

Goals

Modernize the WIC digital experience, without diminishing the value of in-person engagement

Increase focus on clients and strategic initiatives at the state and local level

Become a more nimble organization with increased system interoperability



Outcomes

Higher retention rate and increased participation

Increase time spent counseling and reduce manual administrative time for state staff

Capacity to adapt to dynamic client needs with a proactive approach

Expected Return on Investment

INCREASED CLIENT PARTICIPATION

- Increased enrollment
- Increased retention rate
- Decreased cancellations and no-shows
- Increased community health referrals
- Increased likelihood of children having a regular medical provider

IMPROVED CLIENT EXPERIENCE

- Increased monthly benefit usage
- Increased time spent counseling during appointments
- Increased number of active clients
- Increased client satisfaction rate & perceived value
- Improved diet and other related health outcomes

INCREASED OPERATIONAL EFFICIENCY

- Reduced local agency administrative time
 - Scheduling, calling, other
 - Time spent gathering and validating proofs
- Reduced time spent on administrative tasks during appointment (inputting basic client information, verifying proofs, etc.)
- Reduced time spent looking for internal policies and documentation
- Increased employee productivity

IMPROVED ORGANIZATIONAL AGILITY

- Increased data-informed decisions
- Increased data accessibility
- Reduced state administrative time
 - IT management
 - Ad hoc requests
 - Time spent uploading and extracting data

Key Principles

Client-centered	At its core, Colorado WIC's digital ecosystem needs to be designed around the client experience . Digital is a means to an end, and a new platform implementation needs to be intentional, ensuring an increase in perceived value for all current and potential clients.
Integration	Colorado WIC's digital ecosystem needs to break down the silos of information that currently prevent streamlined client journeys and efficient internal workflows .
Accessibility	Clients need access to tools and information empowering them to get the maximum value out of the WIC Program. This includes creating equitable environments where clients feel safe and trust that they will receive the benefits they are due. To best serve clients, Colorado WIC staff also need to access timely reports to make data-informed decisions.
Flexibility	Colorado WIC's digital ecosystem needs to provide a flexible and future-proof foundation as client needs and the program evolve over time.
Scalability	Colorado WIC's digital ecosystem must be able to accommodate organizational and operational growth without requiring significant new investments or restructuring of existing systems.
Security	Colorado WIC's digital ecosystem must offer the necessary safeguards to protect the large amounts of personal and medical information Colorado WIC handles.

Digital Priorities

Client Tools	To improve the experience and perceived value of the Colorado WIC Program, clients need modern and mobile optimized tools to access critical information and resources.
Automation & Efficiency	Streamlining previously manual tasks will cut down on administrative time for staff at both the state and local level, freeing up more time to focus on client engagement.
Training & Management	Between state and local staff fulfilling many roles to meet the needs of Colorado WIC clients, it is critical that all staff operate using the same set of established processes & resources to continue to scale an equitable program.
Content Strategy	Programmatic content creation and distribution, particularly among the primary digital channels for the Colorado WIC program, need to adhere to a strategy centered around Colorado WIC clients, their needs and behaviors.
Feedback	Creating cycles of consistent feedback collection from clients, and the infrastructure to support those cycles, will enable Colorado WIC staff to be nimble and adjust to client needs.

RATIONALE

Client Tools

Modern digital tools provide accessibility and flexibility to clients, allowing them to gain maximum value out of the WIC Program. Colorado WIC can alleviate a significant amount of friction clients face by providing a **client portal** that enables them to manage their WIC experience on their own, as well as an **improved shopping companion app** for maximizing usage of monthly benefits.

These tools empower clients throughout their WIC journey, while also relieving burdensome administrative tasks for state and local agency staff.

RECOMMENDATIONS

Client Tools

People

- Usability Testing for Shopping Companion App
-

Platform

- Client CRM (Backstage)
- Client Portal (Frontstage)
- Shopping Companion App Overhaul

RECOMMENDATIONS

Client Tools

Client Portal

Clients expect modern ways to interact with Colorado WIC and its services. Whether it is scheduling appointments, preparing for in-clinic visits, or viewing benefits and child-development progress, clients increasingly expect 24-7 access—at their fingertips. Colorado WIC has an opportunity to build a modern portal for clients that can operate as a self-service hub for their engagement with the program. This will both improve client access to information and reduce time-intensive appointment management.

Key features will include:

- Scheduling and viewing appointments
- Uploading and reviewing required documents
- Providing feedback on appointments and other experiences
- Accessing personalized content and recommendations

RECOMMENDATIONS

Client Tools

Client Portal - Technical Approach

Salesforce is an industry-leading CRM that will offer a highly extensible database for managing client records. By leveraging a customizable off-the-shelf option, Colorado WIC will be well positioned to efficiently achieve important functionality without extensive custom development.

Salesforce's Experience Cloud product will offer a relatively low-cost solution to implementing and maintaining proposed functionality. The platform includes features such as an authenticated experience, help desk, simple integrations, and an ability to customize content based on user information.

Colorado WIC will be able to leverage lower-cost account subscription options to provide accounts for both clients and local agency staff, enabling them to upload, review, and manage content and other information; Key state staff members will have administrator access to manage configurations.

RECOMMENDATIONS

Client Tools

Shopping Companion App Overhaul

The current Colorado WIC app is a valuable resource for clients, but there are significant opportunities to level-up the utility of the app and make it an even better shopping companion. Based on existing research, there are several easy-to-identify areas for improvement, such as offline-loading of approved UPC codes. However, to ensure that the app is meeting the needs of clients, moderated usability testing should be conducted to uncover how clients use the app—and where new features or improvements would be valuable—before any major changes are made.

RECOMMENDATIONS

Client Tools

Program Eligibility Prescreener

The process for prospective clients to determine WIC program eligibility needs to be as frictionless as possible. Current static tables (presented as images or long bulleted lists) are difficult to scan and lose important context when passed through simple translation tools like Google Translate. An interactive prescreening tool, made available as a web application with in-culture translation in multiple languages on ColoradoWIC.gov, gives prospective clients an easy and accessible way to learn if they are eligible to join the WIC program.

RATIONALE

Automation & Efficiency

With the current lack of interoperable systems, there are a number of manual and time intensive processes needed to keep the WIC program running. By **migrating crucial data storage to the cloud, introducing interoperable platforms into Colorado WIC's digital ecosystem, and developing/maintaining data governance** practices, processes can be streamlined and automated.

RECOMMENDATIONS

Automation & Efficiency

People

- Data Governance Working Group
-

Process

- Centralized Special Formula Ordering Form
 - Integrated & Automated Client Portal Reports
 - Cloud Migration - ETL & Data Processing
-

Platform

- Self-Service Chatbot
- Text Platform / Client CRM Integration
- Cloud Migration - Compass Database

RECOMMENDATIONS

Automation & Efficiency

Texting Integration

Texting has proven to be a successful and popular outreach tool for clients, but current platforms (Onsolve, Teletask) limit the flexibility and speed with which Colorado WIC state and local offices can craft new messages or respond to urgent messaging needs. By adopting a modern, centralized texting platform—connected in real-time to your audiences and with an easy-to-use interface—Colorado WIC staff will be able to easily set up audience segments, automated and conditional message triggers, and custom texts.

Example use cases include:

- *Texting targeted groups of clients about clinic snow closures and links for rescheduling*
- *Automated appointment reminders*
- *Customized lists of documents to bring to an appointment*
- *Notification that a formula prescription is ready for pickup*
- *Automated message with a survey link when a shopping trip is completed*

RECOMMENDATIONS

Automation & Efficiency

Self-Service Chatbot

Leveraging the integrated text platform, Colorado WIC can offer clients a ‘Ask WIC’ chatbot to respond to common questions and facilitate simple tasks.

This chatbot would be accessible via SMS message and respond to simple queries such as *“Tell me about WIC”*, *“What should I bring to my appointment?”*, *“Send me the approved food list”* or *“What is the nearest clinic?”* This service would give clients and potential clients an opportunity to engage or learn about WIC without requiring internet access or WIC staff involvement.

Future iterations could also allow clients to interact with aspects of their accounts, including their benefit balance and other personalized information.

RECOMMENDATIONS

Automation & Efficiency

Data Management Working Group

While the Data Manager role will lead data governance efforts, it is critical to build buy-in and communicate new approaches and policies to data across the program at both the state and local level. A data management working group with cross-functional representation will help to ensure that varying perspectives and specialties are considered in the development and refinement of WIC policies and processes.

RECOMMENDATIONS

Automation & Efficiency

Integrated & Automated Client Portal Reports

Reporting services are automatically included in the new Client Portal & CRM platform. The CRM platform also functions as a data warehouse and business intelligence platform. This integrated concept allows snapshot reporting, minimal maintenance, self-service features, and a low level of effort for setup of individual reports.

In addition, other reporting oriented plug-in services are available for the CRM platform. Pre-built community and vendor built applications can streamline specific reporting needs as the WIC program continues to scale.

RATIONALE

Training & Knowledge Management

Diversity, Equity, and Inclusion are the lens for all changes to bring clients to the center of Colorado WIC's reimagined digital ecosystem. Creating a more trusting and equitable environment for clients to engage with the WIC program requires addressing stigma around the program at-large and uncovering ways to combat it from within. By engaging in a **third-party DEI audit & training**, program staff at all levels can integrate inclusive strategies into the client experience.

The value of digital solutions isn't limited to the client experience, but also has great potential to improve the day-to-day workload of WIC staff. State and local staff are called upon to fill a wide variety of roles within the WIC program—the range of documentation for the many policies and processes to follow reflects that reality. A more streamlined and **centralized knowledge management tool (or intranet)** would better enable them to access the resources they need, when they need them.

RECOMMENDATIONS

Training & Knowledge Management

People

- Data Analyst / Admin Hire
 - Staff Data Cross-training
-

Process

- DEI Audit & Training
 - Onboarding Program Overhaul
-

Platform

- Intranet for State & Local Agency Staff
- Vendor Portal

RECOMMENDATIONS

Training & Knowledge Management

Data Application Specialist Hire (Accomplished: December 2020)

In addition to managing the data systems that enable the WIC Program to function at its current level, this new hire could also participate in data analysis and data management across the program. By automating previously manual processes and offloading day-to-day analysis and management support to this role, WIC's Data Manager can shift their focus to higher-level, strategic initiatives and oversight.

Staff Data Cross-training

The establishment of support systems across internal teams will increase the self-sufficiency of staff when certain kinds of reporting requests arise and further ensure transparency into data processes and governance, preventing future bottlenecks. Recommended cross-training topics include, but are not limited to, how to properly export data out of WIC systems and data analysis & visualization.

RECOMMENDATIONS

Training & Knowledge Management

DEI Audit & Training

Focusing on the client experience and ways in which a diverse range of clients can build deeper trust with the WIC Program requires taking a critical look into how to create an equitable and inclusive environment. Staff at the state and local level are typically immersed in the WIC "world" for many years; therefore, it is recommended to consult outside expertise on such matters. Identifying areas within the WIC Program where staff can interrupt bias will inevitably improve both the in-person and digital client experience.

RECOMMENDATIONS

Training & Knowledge Management

Intranet for State & Local Agency Staff

ColoradoWIC.gov currently attempts to provide some of the necessary functionality of an intranet, but lacks the dynamic structure, communication functions, task management, and LMS opportunities that purpose-built intranet platforms offer. By attempting to serve both the internal staff as well as WIC clients, ColoradoWIC.gov ends up serving neither audience sufficiently. A shared intranet—for both state and local agency staff—will provide a well-organized and easily searchable location for relied upon resources, help to centralize internal communication, and cut down on administrative time that can be refocused on clients.

Minimum Features for Knowledge Management Platform:

- Single Sign-On
- Searchable resource library
- Internal messaging
- Integration with ticketing systems
- Options for LMS integration
- Central onboarding resource repository
- Central form for special formula ordering

RECOMMENDATIONS

Training & Knowledge Management

Onboarding Program Overhaul

In addition to centralizing knowledge management for staff at both the state and local level, the onboarding experience needs to be reviewed by an outside expert for consistency and instructional design best practices. Staff currently managing the onboarding process for local agencies have supported the role, but need to be properly supported themselves and set up for success as the program continues to scale. This review will include an assessment of the following (excluding any materials not required from FNS):

- Onboarding curriculum
- Continuing education curriculum
- LMS platforms
- Training schedules
- Reference resources

RECOMMENDATIONS

Training & Knowledge Management

Vendor Portal

To help vendor partners improve the shopping experience for WIC clients, the Colorado WIC Program needs to provide a consolidated repository of resources that can be used to keep retail staff up-to-date on the latest policies, approved products, and situational troubleshooting. Segmenting a section of the client portal where vendors and their employees can regularly access this information is a relatively low technical lift for providing resources in a digital format to those who wish to use it. This approach would also allow for scalability over time, as well as the opportunity to introduce more interactive training and advanced communications between vendors and WIC staff.

RATIONALE

Content Strategy

WIC's current and prospective clients want to be reached and engaged with on digital platforms. In order to do this effectively, content must be strategically created and distributed.

With ColoradoWIC.gov as the digital hub for program information and resources, Colorado WIC needs to first **upgrade the current CMS to Drupal 9**, followed by client-centered **usability testing** for improved information architecture and a **refreshed website design**.

Additionally, an **updated content strategy for all digital channels** (website, social media, email) is needed, including developing a **client-centered messaging framework** to guide how content is developed and presented in order to best achieve the WIC Program's goals.

Finally, there is an opportunity to **develop a resource sharing partnership** with community health organizations and health navigators to leverage existing materials as a means to better identify members of the community who would benefit from WIC services.

RECOMMENDATIONS

Content Strategy

People

- Website Usability Testing
 - Resource Sharing Partnerships
-

Process

- Content Strategy for Digital Channels
 - Client-centered Messaging Framework
-

Platform

- Website CMS / D9 Upgrade
- Website Refresh

RECOMMENDATIONS

Content Strategy

Resource Sharing Partnerships

Many current and potential WIC clients are already engaged with other community health organizations in Colorado. By developing partnerships, sharing resources, and enabling a clearer referral pathway for health navigators to identify potential community members in need of WIC benefits, the WIC Program can hope to increase its reach—and ultimately its impact—without needing to bring on any new outreach staff internally.

Client-centered Messaging Framework

The messaging and language used by Colorado WIC in-person and through digital channels plays a crucial role in making the WIC experience accessible to clients. A messaging framework that is designed with the client in mind needs to be developed. This process should include obtaining feedback from clients before finalizing and rolling out the updated framework.

RECOMMENDATIONS

Content Strategy

Digital Content Strategy

An effective content strategy needs to account for every client touchpoint in the digital ecosystem.

A client-focused content strategy considers the goal, specific audience, and their needs for each social channel, WIC-owned platform, and piece of content.

The following items have been identified as key elements to consider:

- Website Content Planning
- Social Media Content Planning
- Client Portal Content Planning
- Multilingual Content for Digital Channels and Platforms

RECOMMENDATIONS

Content Strategy

Website Usability Testing

The website is one of the primary resources for potential or current clients to access Colorado WIC communications and materials, but it has also been described as confusing or hard to use. Conducting moderated usability testing with current clients will help identify opportunities for changing or updating how the site is laid out and its functionality.

Website Refresh

Leveraging usability testing outcomes and the updated communications guidelines, website content and information architecture should be refreshed. The focus of this refresh should be on content and structure, rather than new functionality, branding, or visual updates, except as identified in the usability testing or new communication strategy.

RECOMMENDATIONS

Content Strategy

Website CMS/D9 Upgrade

Drupal 8 reaches end-of-Life in November 2021 and the Colorado WIC website will need to be updated prior to that date. The upgrade from Drupal 8 to 9 is meant to be essentially a step-upgrade, think 8.9 to 8.10, but there are a variety of modules and functions that need to be updated to prepare for that. Making these updates early will also ensure the site is ready for any other necessary content or technical updates.

RATIONALE

Feedback

Establishing multiple digital touch-points for feedback loops throughout the WIC journey gives clients an opportunity to provide insight into their experience. The most valuable times to ask clients for their feedback are after attending an appointment and after their shopping experience.

As a part of this feedback collection, a **feedback governance plan** must be defined to properly monitor, analyze, incorporate, and address this data.

RECOMMENDATIONS

Feedback

Process

- Feedback Loops
 - Post-Appointment
 - Post-Shopping
 - Misc. Digital Touchpoints
- Feedback Governance

RECOMMENDATIONS

Feedback

Feedback Loops

Feedback loops are a strategy to collect feedback, opinions, and suggestions from clients to continually improve Colorado WIC's service, which in turn improves experience, engagement, and impact. This is mutually beneficial for both parties.

Prompted Feedback Touch-points

Two touch-points have been identified to actively ask clients for feedback: (1) Post-Appointment (2) Post-Shopping. These critical points in the client journey will provide the most valuable feedback. With the planned digital ecosystem integrations, a text would be sent to the client asking for feedback automatically, triggered by CRM and EBT data.

Non-prompted Feedback Touch-points

Passive touch-points are recommended on digital platforms for clients who seek to provide feedback on their own. e.g. an accessible link in the client portal to provide feedback.

RECOMMENDATIONS

Feedback

Feedback Loop Cycle

ASK & COLLECT

Ask clients for feedback at key Colorado WIC touch-points. Feedback can be collected through surveys, 1:1 interviews, focus groups, etc.

ANALYZE

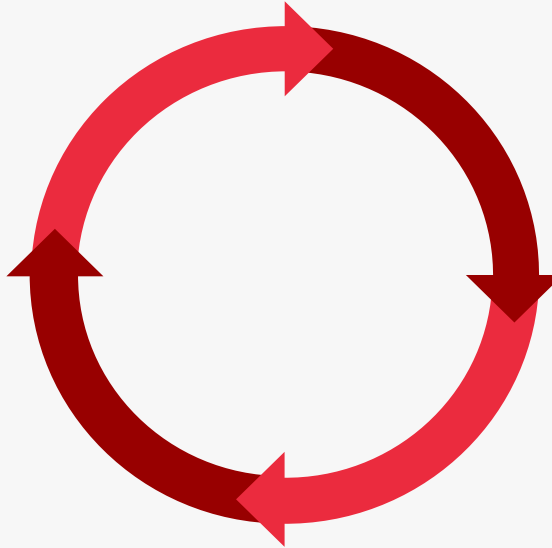
Once feedback is collected, analyze and categorize the feedback. Then determine which feedback will be used to create a better client experience and create a plan to incorporate it.

CLOSE THE LOOP

Show clients their opinions are valued by letting them know their feedback has been incorporated.

ADDRESS & INCORPORATE

If needed, follow-up with the client to get additional information. Then implement/address select feedback to improve the client experience.



RECOMMENDATIONS

Feedback

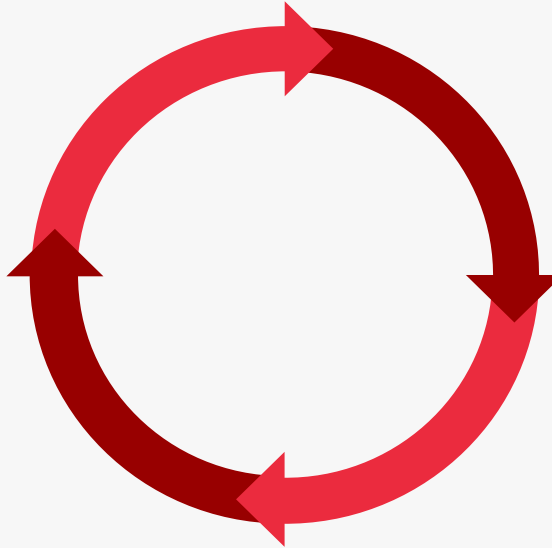
Feedback Loop Cycle Example: Prompted Feedback

ASK & COLLECT

Clients receive a text message after an appointment and shopping, triggered by CRM and EBT data. Clients are able to respond with quick responses, such as “good”/“bad” and thumbs up/down emojis.

CLOSE THE LOOP

Nutrition consultants/local agency staff close the loop with the client, if needed.



ANALYZE

Feedback is funneled into CRM and available through self-service reporting for nutrition consultants to monitor and analyze. State staff informs and communicates with local agencies regarding feedback, if necessary.

ADDRESS & INCORPORATE

Depending on the feedback, either local staff or nutrition consultants take lead on following up on/addressing/incorporating the feedback.

RECOMMENDATIONS

Feedback

Feedback Governance

To be proactive with feedback and close the loop, roles and responsibilities need to be defined. Using a RACI matrix, the proper tasks can be mapped to individuals, teams, and offices. Below is a sample RACI for prompted feedback governance:

TASK	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED
Monitor	Nutrition Consultants	Nutrition Consultants	N/A	N/A
Analyze	Nutrition Consultants	Nutrition Consultants	WIC Director	Local Agencies
Address / Incorporate	Local Agencies / Nutrition Consultants	Nutrition Consultants	WIC Director	Nutrition Consultants
Close the Loop	Local Agencies / Nutrition Consultants	Nutrition Consultants	Local Agencies / Nutrition Consultants	Local Agencies / Nutrition Consultants

Digital Ecosystem

Digital Ecosystem Overview

Ideal Future State, a Phased Approach

Taking a phased approach to tool integration and adoption will ease the transition and change management of systems, while allowing the focus to remain on the client. The initial leap into the minimum viable product provides opportunities for iterative refinement of the final ecosystem and alleviates the risk of over-investing in unnecessary features or interrupting business processes.

Phase 1 Client Portal Minimum Viable Product

Limited integrations between client portal and rest of ecosystem

Some features of Compass are retired and transitioned into the client portal

Phase 2 Client Portal Integrations

Compass, EBT and other sources are integrated directly into the client portal

Reporting remains coupled with Compass

Digital Ecosystem

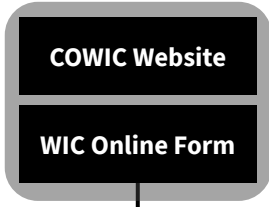
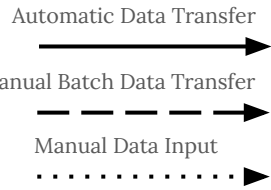
Current State

Outreach

Engagement

Operations

Reporting



Front Stage
Back Stage

Ideal State

The **client portal will become the new central management information system**; however, Compass as an application is still used. Compass's SQL server is bi-directionally synced with the client portal database. While this creates some redundancy, it allows future interoperability and the option for an easier transition to a new MIS.

Components of Compass and other services are transitioned into the client portal. Texting, scheduling, and a self-service document upload feature will utilize the client portal as the new data repository.

Cloud hosted data management tools (ETL) are implemented to increase efficiency and reduce administrative time. In addition, if Compass is to remain the central application, moving Compass's SQL Server database to a cloud environment will be needed for long-term sustainability and flexibility.

Digital Ecosystem

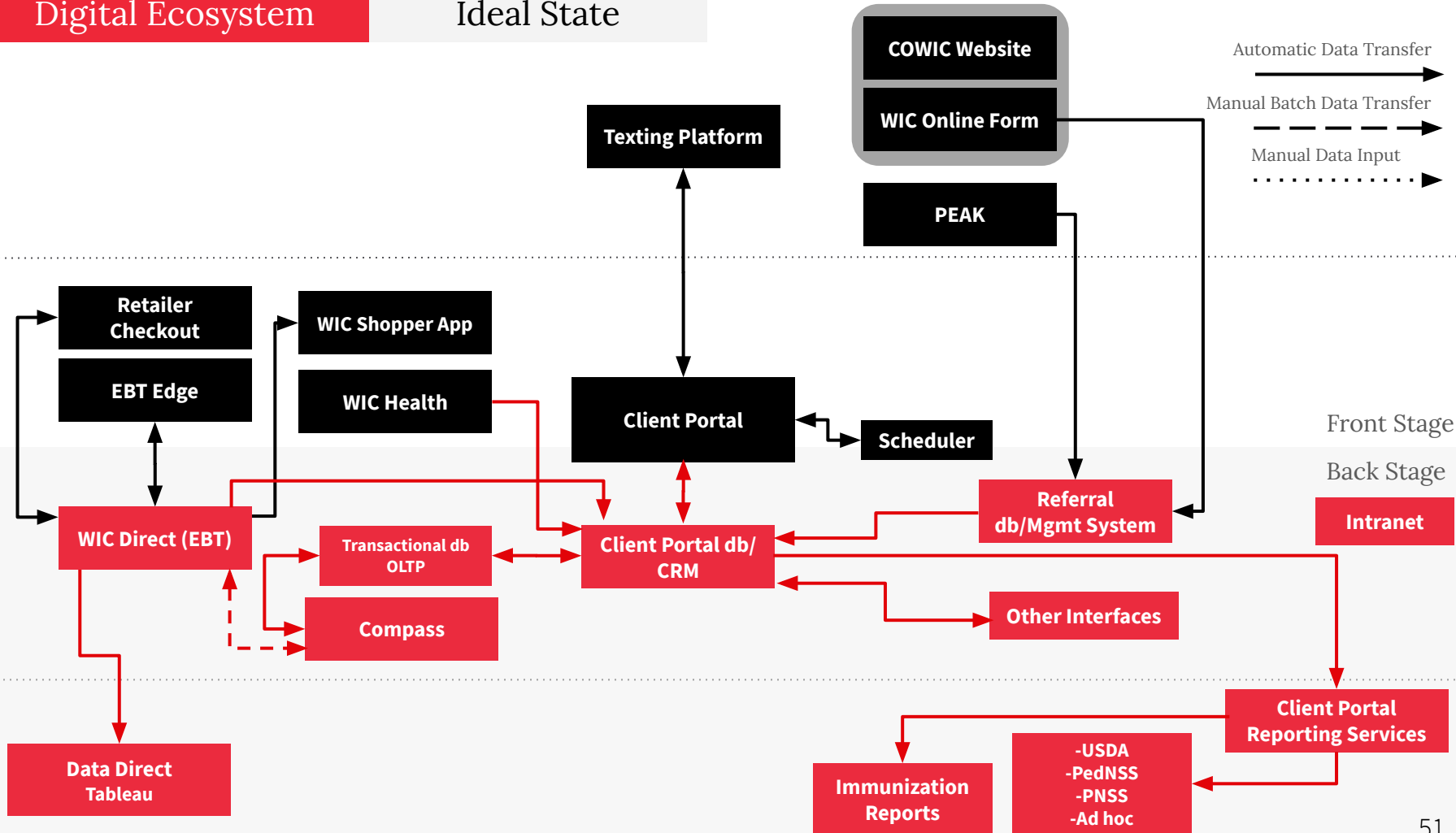
Ideal State

Outreach

Engagement

Operations

Reporting



Phase I - Client Portal Minimum Viable Product

The first phase will establish the foundation for the client portal, not yet fully integrating into other systems. However, product requirements during this phase should still incorporate components for automatic data transfer to other systems. This phase is meant to modulate high-impact components and processes in a lower risk environment, without completely abandoning the current infrastructure.

Features

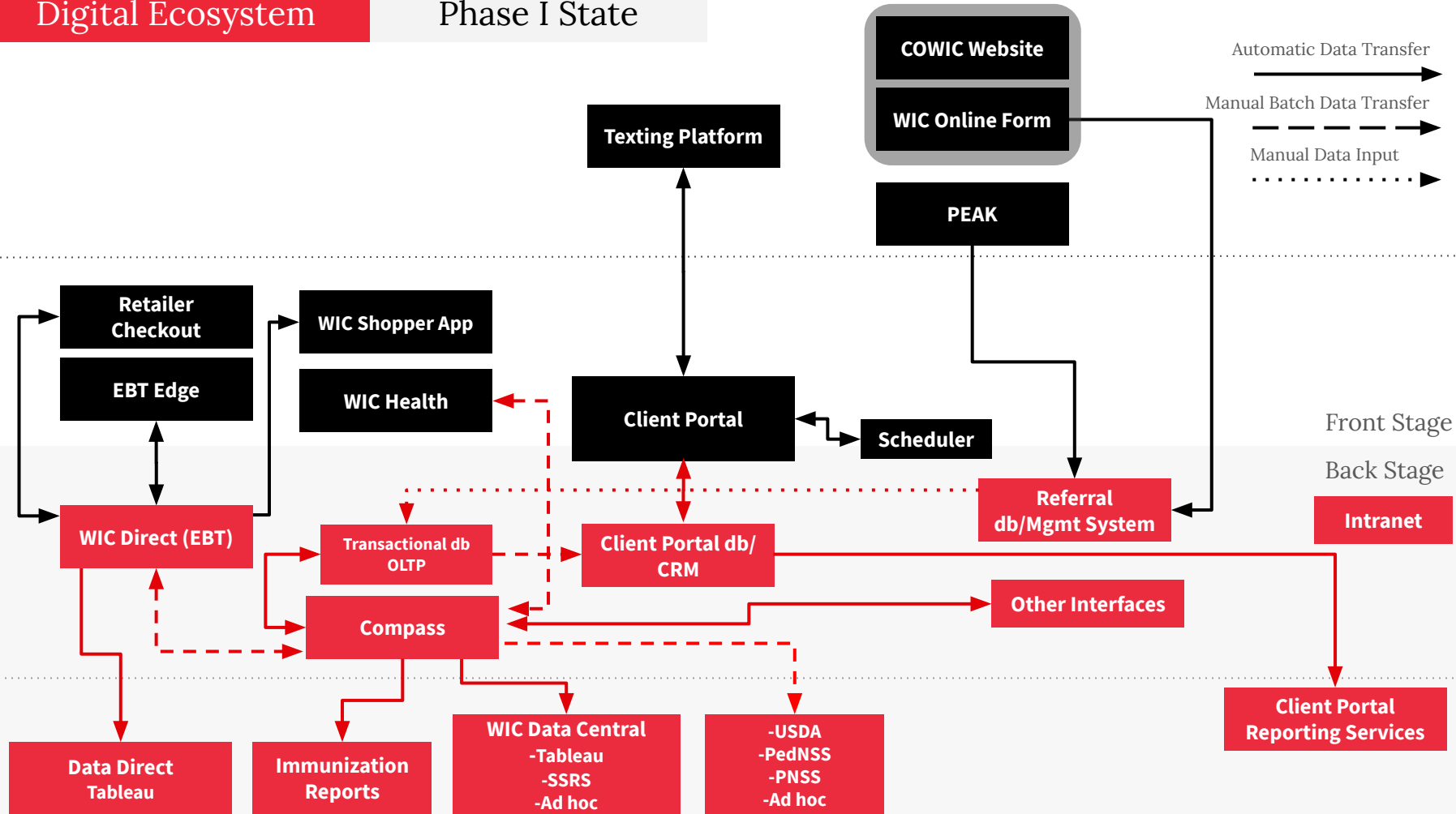
- Scheduling is moved from Compass into the client portal
- The texting platform is integrated into the client portal; no longer requiring manual extracts and uploads
- Document and proof upload is a self-service feature in the client portal, but does not pass into Compass automatically in phase one
- The client portal does not integrate directly into Compass, EBT or other interfaces
 - Batch jobs upload select information from Compass into the client portal

Outreach

Engagement

Operations

Reporting



Phase II - Client Portal Integrations

The second phase will develop automatic integrations to-and-from multiple data sources. The client portal begins to resemble a new central data repository. Reporting services in this phase are still centralized around Compass. However, building off of WIC Data Central, the client portal's reporting services will begin development, allowing self-service reporting within the CRM.

Features

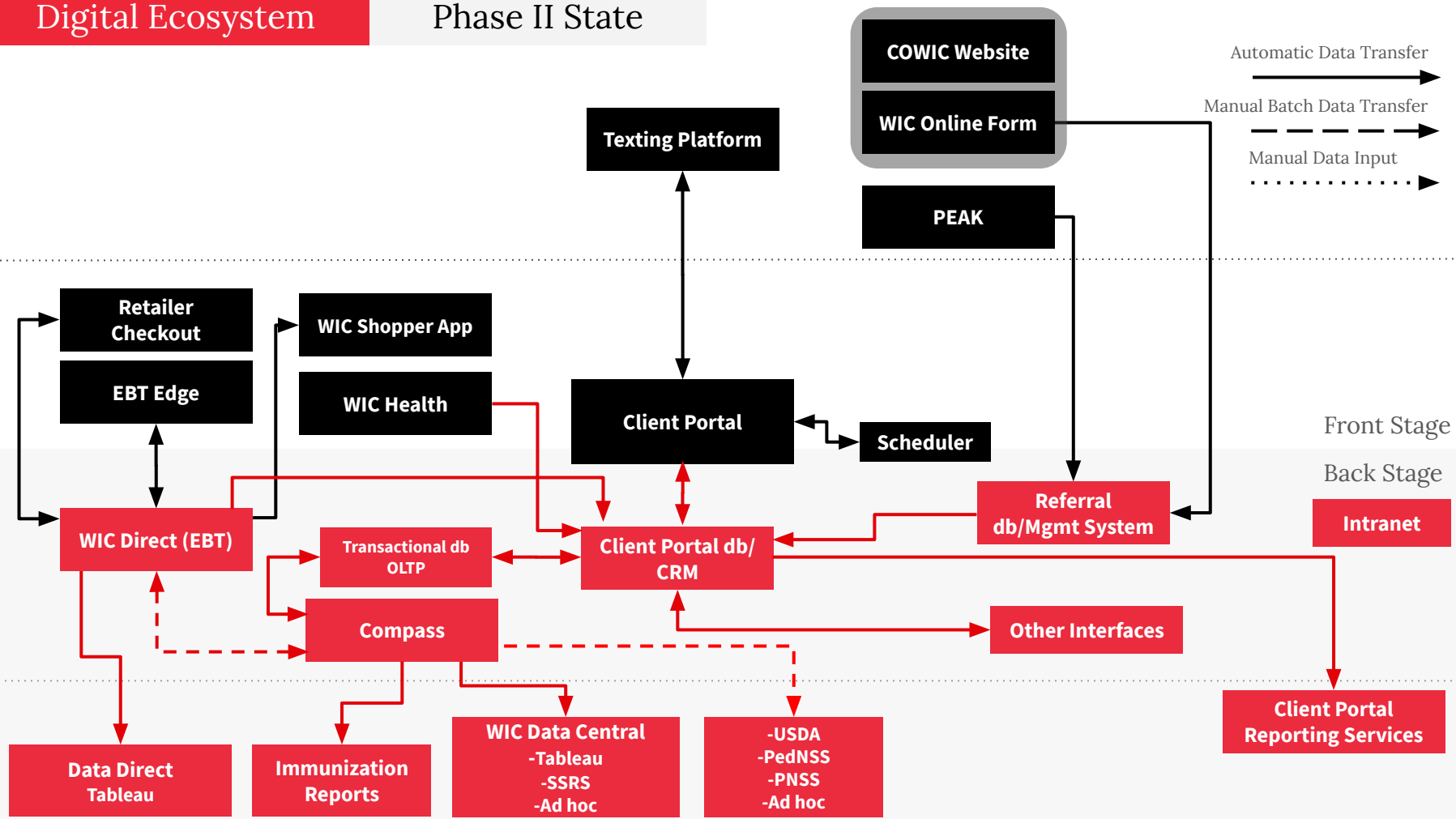
- Integrations with the client portal utilize cloud based ETL services
 - Compass
 - EBT
 - WIC Health
 - Referral database
- Reporting services in the client portal to begin development
- Compass cloud migration (optional)

Outreach

Engagement

Operations

Reporting



Data Movement (ETL) - Client Portal Integrations

The glue that holds all of these systems together are the individuals and systems that encompass data extraction, loading, and transformation processes. This data management term is commonly referred to as ETL; these tools are the keys to system interoperability.

In the Ideal State, a single or multiple ETL tools with the following features will be deployed:

- **Cloud hosted** software reduces costs and eliminates friction of ownership transfer
- **Click-to-code GUI** functionality reduces the need for expensive human capital and increases efficiency
- **Bi-directional synchronization** keeps separate databases consistent

Data Movement (ETL) - Client Portal Integrations

Hosting a database and other services such as ETL jobs in the cloud has benefits Colorado WIC can take advantage of. This is dependent on whether or not OIT will require WIC to pay for their locally hosted database servers in the future in regards to Compass's database.

Cloud Advantages

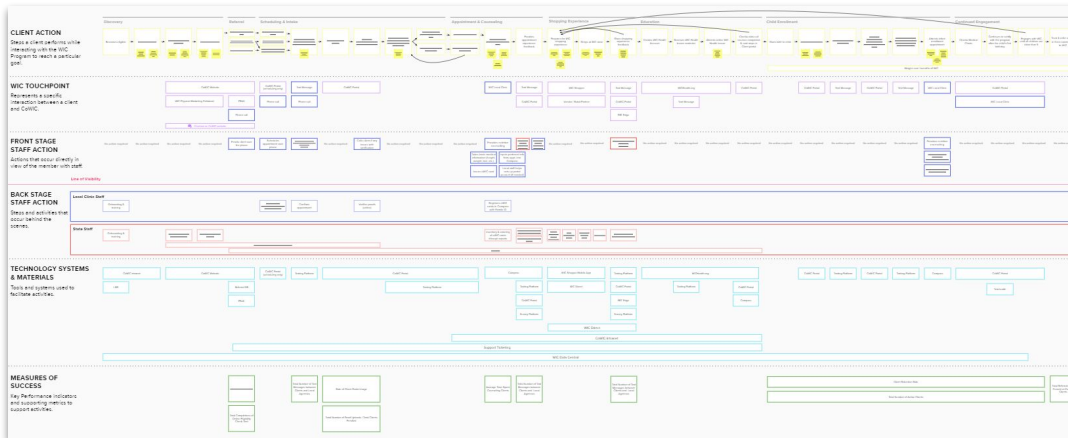
- **Integrations** - Cloud hosted services are built with other integrations in mind. SF, AWS, GCP and Azure offer a wide range of tools and opportunities to build integrations and custom functionality
- **Scalability and Redundancy** - If at any time Colorado WIC needs to expand their compute or storage needs, the cloud offers fast, cheap, and flexible solutions
- **Little to No Admin Time** - Much of the database administrative work is managed by the hosting platform
- **Security** - Upgrades and patches are often done automatically by the hosting platform, reducing DBA workload
- **Long-Term Cost Savings** - Cloud computing and storage is cheaper in hardware and processing terms, but also in offloading the cost of human capacity

Service Blueprint

Service Blueprint

To aid in development of the Ideal State of Colorado WIC's digital ecosystem, a Service Blueprint was created to help holistically understand the WIC Program experience. [View the full blueprint here.](#)

Service Blueprints paint a picture of how the people, processes, and platforms of WIC operate in service of the client journey. A blueprint includes client actions, front-stage staff actions, backstage staff actions, back-end systems, and the measures of success along the way.



Strategy Governance

Governance Approach

Implementing a large-scale digital transformation across the Colorado WIC Program requires having the necessary people and processes in place to steer and drive the organization toward the strategy's unifying vision.

This five-year digital transformation process will require significant change management and participation from key individuals at the state and local level, as well as vendors and partners. Gaining and sustaining buy-in from stakeholders across and outside of the organization is necessary for adoption and changing behaviors.

This section will outline the ownership and governance of the recommended tools and processes with the training and skills required to maintain these systems.

Change Management Guidance

A digital transformation of this scale heavily relies on Colorado WIC staff being onboard—or at the very least, feeling consulted—with the changes taking place. Previously, staff have felt they were informed of changes, but weren't given support and were often overloaded with information, making it hard to understand the case for change.

- Carefully choose what is communicated, as to not overload staff
- Highlight the case for change and the value it adds, whether for staff or clients
- Communicate what support is available to staff during the adoption and transition processes

These change management principles will also need to be considered for client audiences, as they will need guidance in navigating the new ecosystem, platforms, and tools. Through thoughtful communication, audiences are more effectively led to information and aware of who can assist with any questions they may have.

Digital Transformation Champions

To ensure adoption at the state and local levels, identify individuals across Colorado WIC at all levels to advocate for the new processes and systems—both for internal staff and external clients. A peer-to-peer program will provide an outlet for internal staff to get the information they need in a timely manner and will influence individuals to make changes to their workflow.

Ideal Champions will have a desire to adopt the new platforms and will be enthusiastic about socializing these new systems and processes. Individuals will:

- Act as a resource and help colleagues with understanding new tools
- Hold open office hours to explain new technologies and processes
- Ensure adoption of these tools in their teams and offices

Quarterly Check-ins

Colorado WIC will hold quarterly check-in meetings to ensure:

- The roadmap is on track and meeting defined strategy goals
- Recommendations remain in line with Colorado WIC's organizational goals/priorities/needs
- Proposed items are revisited at each key milestones with adjustments made, as needed

Internal Management

The following activities for the internal management of Colorado WIC's Digital Working Group will help hold the organization accountable to the roadmap:

- **Establish a digital working group.** Form a digital working group and codify processes. Hold standing monthly meetings for the digital working group (over time this can move to bi-monthly).
- **Define roles and responsibilities.** For each roadmap initiative use the [RACI matrix framework](#).

Internal Communications Strategy

- **Digital Strategy all-staff meetings for the state office.** Organize quarterly meetings at the state level where digital strategy is discussed and next steps are shared broadly
- **Bi-monthly digital transformation email newsletter updates.** Send an email update to Colorado WIC staff every-other month, communicating changes and roadmap progress
- **Nutrition consultant - local agency communication.** Encourage local agencies to reach out to their assigned nutrition consultants with questions/comments regarding digital strategy initiatives
- **Feedback mechanisms.** Identify a resource and communicate to staff that someone is available to address questions and concerns

External Marketing Communications Efforts

To maximize the investment Colorado WIC is making in its digital transformation, dedicated marketing communications efforts will be required which reflect the new value and capabilities of the WIC experience.

Roadmap

Roadmap

The following slides provide a roadmap to accomplish the aforementioned digital priorities and associated recommendations over the next five years.

An interactive version of the full roadmap is available online [here](#) (or in an alternative timeline view [here](#)).

Roadmap

		YEARS (START DATE)				
		2021	2022	2023	2024	2025
FOCUS	PROCESSES	<ul style="list-style-type: none"> Client-centered Messaging Framework DEI Audit - 3rd Party ¹ Feedback Loop Governance 	<ul style="list-style-type: none"> Digital Channel Content Strategy Digital Feedback Loops Integrated & Automated Client Portal Reports ² 	<ul style="list-style-type: none"> Centralized Special Formula Ordering Form Cloud Migration - ETL & Data Processing 	<ul style="list-style-type: none"> Onboarding Program Overhaul 	
	PLATFORMS	<ul style="list-style-type: none"> Website CMS/D9 Upgrade ¹ Client CRM ² Client Portal 	<ul style="list-style-type: none"> Intranet for State & Local Agency Staff Text Platform / Client CRM Integration ² Cloud Migration - Compass Database 	<ul style="list-style-type: none"> Self-Service Chatbot Website Refresh ³ 	<ul style="list-style-type: none"> Vendor Portal Shopping Companion App 	
	PEOPLE	<ul style="list-style-type: none"> Website Usability Testing ¹ Data Governance Working Group 	<ul style="list-style-type: none"> Resource Sharing Partnerships 	<ul style="list-style-type: none"> Staff Data Cross-training 		<ul style="list-style-type: none"> DEI Audit Check-in (self-audit) ¹

TIMELINE

Client Tools



TIMELINE

Automation & Efficiency

		YEARS (START DATE)				
		2021	2022	2023	2024	2025
FOCUS	PROCESSES		<ul style="list-style-type: none"> Integrated & Automated Client Portal Reports ² 	<ul style="list-style-type: none"> Centralized Special Formula Ordering Form Cloud Migration - ETL & Data Processing 		
	PLATFORMS		<ul style="list-style-type: none"> Text Platform / Client CRM Integration ² Cloud Migration - Compass Database 	<ul style="list-style-type: none"> Self-Service Chatbot 		
	PEOPLE	<ul style="list-style-type: none"> Data Governance Working Group 				

TIMELINE

Training & Management

		YEARS (START DATE)				
		2021	2022	2023	2024	2025
FOCUS	PLATFORMS		Intranet for State & Local Agency Staff		Vendor Portal	
	PEOPLE			Staff Data Cross-training		DEI Audit Check-in (self-audit) 1
	PROCESSES	DEI Audit - 3rd Party 1			Onboarding Program Overhaul	

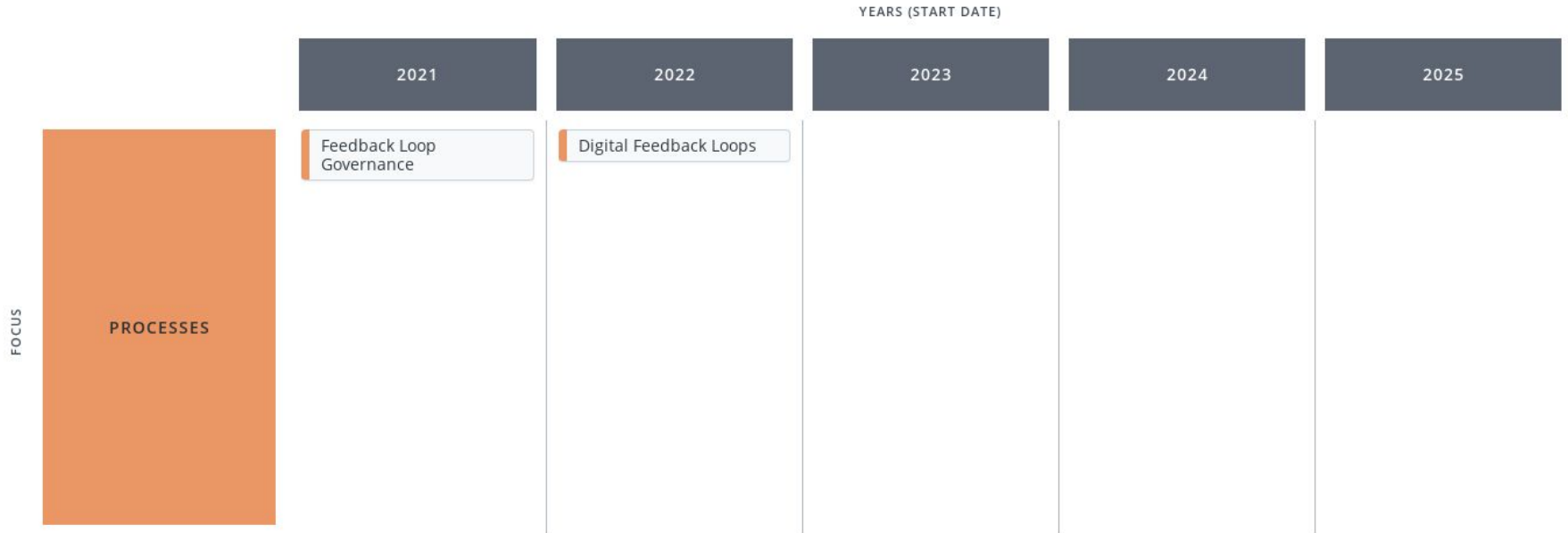
TIMELINE

Content Strategy

		YEARS (START DATE)				
		2021	2022	2023	2024	2025
FOCUS	PLATFORMS	Website CMS/D9 Upgrade 1		Website Refresh 3		
	PEOPLE	Website Usability Testing 1	Resource Sharing Partnerships			
	PROCESSES	Client-centered Messaging Framework	Digital Channel Content Strategy			

TIMELINE

Feedback



Impact vs. Estimated Effort

		IMPACT		
		LOW	MEDIUM	HIGH
LEVEL OF EFFORT	LOW	<ul style="list-style-type: none"> Centralized Special Formula Ordering Form 	<ul style="list-style-type: none"> Data Governance Working Group Staff Data Cross-training 	<ul style="list-style-type: none"> Client-centered Messaging Framework Digital Channel Content Strategy
	MEDIUM	<ul style="list-style-type: none"> Website CMS/D9 Upgrade ¹ Self-Service Chatbot Vendor Portal 	<ul style="list-style-type: none"> Website Usability Testing ¹ Website Refresh ³ Intranet for State & Local Agency Staff Resource Sharing Partnerships 	<ul style="list-style-type: none"> DEI Audit Check-in (self-audit) ¹ Digital Feedback Loops Feedback Loop Governance
	HIGH		<ul style="list-style-type: none"> Onboarding Program Overhaul Shopping Companion App 	<ul style="list-style-type: none"> DEI Audit - 3rd Party ¹ Text Platform / Client CRM Integration ² Cloud Migration - ETL & Data Processing Client CRM ² Cloud Migration - Compass Database Integrated & Automated Client Portal Reports ² Client Portal

Appendix

Client Survey

Forum One developed a survey in conjunction with the Colorado WIC team that was distributed in English and Spanish to current clients. There were a total of 2,825 responses between both languages. The following are the key takeaways from those surveys:

- Clients find knowing which paperwork to bring to an appointment confusing or difficult
- No consensus on if in-person appointments were more or less helpful than phone appointments
- Virtual or phone appointments need to bring the same value as in person. Physical clinic visits should not be devalued in favor of a completely digital experience.
- Text message communications is an overwhelmingly positive tool
 - Receiving text reminders in regards to benefits and appointments are appreciated
 - Texting clinic staff for a question or appointment updates would be a good thing
- The Colorado WIC website is currently under utilized for its core audience, the clients
- Most clients were open to or wouldn't mind more technology options as part of their WIC experience
 - Only 29% of participants do not want more technology options

FORUM ONE™