



Case Study

National Membership Organization

Technology Enablement

Situation

- Partnered with the Distribution and Customer Solutions leadership team at the nation's largest membership association to support the planning and implementation of its 1st Direct-To-Consumer (DTC) Omnichannel Insurance Platform
- Identified and sourced the platform vendor
- Facilitated implementation planning across multiple partners and 3rd party vendors

SMA Services



Business Planning



Technology Alignment



Business Transformation

Actions & Impact

- Documented Request for Information (RFI) and Request for Proposal (RFP) materials that included more than 20 technology platform responses
- Established implementation project governance model and related project planning and stakeholder status reporting
- Facilitated multiple (10+) workstreams supporting business and technical requirements development
- Led cross-party communications and stakeholder management for 10+ separate entities
- Developed Board of Director business case and supporting operational/financial projections
- Managed implementation and Year 1 business optimization efforts
- Developed program risk management and 3rd party vendor integration plans

Results



Requirements Development & RFP Management



Annual Enrollment Period (AEP) Readiness