Modernize Your Way of Thinking: Tax Modernization on a Tight Budget
It Can Pay for Itself, Improve Quality of Service, AND Find Lost Revenue
Modernization Drivers

- High Cost of Ownership
  - Legacy environments lock you in to tools, skillsets, vendors, partners
  - Renewal costs can be prohibitive

- Complex Integration Challenges
  - These problems are mainly technical in nature, but result in...
  - A lack of visibility into information due to inability to access data

- Increased Operational Issues
  - Business rules and processes built into the “green screen”
  - Gap widens between business need and system ability to meet need

- Elevated Risk and Business Continuity Concerns
  - Locked in to a diminishing pool of resources and ability to change
  - These resources are the drivers and aids in business continuity
Modernization Approaches

- Let’s Start with Some Basic Assumptions...
  - The Drivers for Modernization are Real
  - The Timeline for Modernization is Shrinking Every Day
  - Modernization Initiatives Can’t Completely Address the Problem
  - What Are We Faced With?

- Completely Replace / Renew Technology
  - Provides an Opportunity for Business Process Alignment
  - What Happens Once Processes and Technology Align?

- Adaptation – Incremental Approach to Modernization
  - Provides an Opportunity for Incremental Business Process Alignment
  - Introduces a Process of Incremental Change
  - Opportunity for Continual Technology / Business Process Improvement
Modernization Case Study

- Capital Appropriation of $7M

- Branded “Granite to Green” which includes...
  A portfolio of integrated projects designed to replace static systems and processes with those that are dynamic to maximize organizational efficiency and effectiveness.


- Appropriation is inclusive of hardware, software, services, and training.
Modernization Case Study - Initiatives

- Upgrade iSeries Hardware Environment
- Upgrade Business Intelligence (*)
- Upgrade GIS System for Property Appraisal (*)
- Automate Business Processes (*)
- Select and Implement Document Processing and Electronic Remittance Systems
- Upgrade Mail Handling and Extraction
- Introduce Performance Management (*)
- Increase Redundancy / Disaster Recovery Planning (*)
- Upgrade Centrex Phone System
- Migrate FTI Data to DB2 (*)
- Enable forms for E-File / Participate in the MeF Program (*)
- Enable Credit / Debit Card Payment Options (*)
Modernization Cornerstone

Integration

Integrity

Intelligence

Information Builders
Integration software ensures on-time and on-budget delivery of critical projects.

- Streamlines operational processes
- Delivers real-time data to analytical processes
- Leverages your existing infrastructure
- Simplifies integration of B2B transactions, cloud-based systems, and third party
- Modernizes legacy technology investments
- Rapid integration you assemble & configure
• Integrating 25 agencies across justice system
• Each agency is a sending and receiving agency
• Intel Server installed at each agency
• Phased approach
  • Legacy exchanges first
  • GJXDM messages next
Data Integrity Functions

Integrity software improves your ability to recapture revenue losses and eliminate hidden costs generated by data inaccuracy and inconsistency.

- Consistent view of critical domains
- Target and segment interactions
- Reduce operational waste
- Identify fraudulent activities
- Empower consistent decision making
Integrity Case Study - Drivers

• New Initiative to transform a family welfare agency to deliver citizen-centric services (transition from agency-centric model)

• Key Challenges
  • Many data silos, systems and data sources
  • Reduce Waste, Fraud and Abuse
    • Reduce duplicate claims, improper submission (twice within a day from different locations), and several other scenarios
  • Streamlining eligibility, benefits and claims processing

• Impacts:
  • Constant demand for increased staffing needs
  • Revenue impact from unnecessary payouts and dispatching staff to recoup improper payment
  • Intake and eligibility screening, benefits and claims took longer to settle putting ‘needy’ citizens in jeopardy
  • Time, effort and costs rooting out and prosecuting flagrant claimants
Project Requirements

• Merge data from several legacy systems
  • Including customer service center data, document imaging & content management

• Provide a single Master Client and Provider Indexes

• Develop a common web based front end

• Deliver “My Account” functionality for customer/providers to update information
What did we consider?

- Invasive/non-invasive integration
- High availability and fault tolerance
- Incremental Modernization
- Data Synchronization – timing, entities
Intelligence software delivers the right information in the right context, to the right people at the right time.

- Rapidly deployed analytical apps
- Customer experience apps & public portals
- SaaS and Cloud deployment
- Large numbers of users
- Operational Business Intelligence
- Self-service reporting for everyone
- SAP and ERP BI environments
- Legacy modernization
- Mobile applications
- Succeeds where other BI products fail!

“By quickly responding to trends in our customers' behavior, we can more readily understand which products they want and the type of service they need. WebFOCUS makes us more nimble and efficient, so we adapt more quickly than the competition.”

Greg Backhus, Director of DW & BI, Helzberg Diamonds
Intelligence Case Study - Drivers

- Multiple and disparate tax applications
- Inefficient means by which to perform research
- Inefficient means by which to coordinate Collections and Audit efforts
- Inability to profile Taxpayers / Constituents
- No “Golden Record”
Within the Single View Taxpayer application, the user may search for a particular taxpayer. Searching may be done either by name, ID, phone number or address.
Modernization Case Study - Initiatives

- Upgrade iSeries Hardware Environment - COMPLETE
- Upgrade Business Intelligence (*) - COMPLETE
- Upgrade GIS System for Property Appraisal (*) - COMPLETE
- Automate Business Processes (*) – IN PROGRESS
- Select and Implement Document Processing and Electronic Remittance Systems - COMPLETE
- Upgrade Mail Handling and Extraction - COMPLETE
- Introduce Performance Management (*) - COMPLETE
- Increase Redundancy / Disaster Recovery Planning (*) – IN PROGRESS
- Upgrade Centrex Phone System - COMPLETE
- Migrate FTI Data to DB2 (*) – IN PROGRESS
- Enable forms for E-File / Participate in the MeF Program (*) - DELAYED
- Enable Credit / Debit Card Payment Options (*) – RFP PENDING

Note: As of June 2012
Information Builders
About Us

- A leading independent global software provider
  - Market leader in large-scale business *intelligence* deployments, inside AND outside the firewall
  - Market leading provider of *integration* technology
  - Leading edge data *integrity* and governance solutions
- We help customers rapidly deploy high value information solutions that deliver game changing results
- Our top priority is **customer success**
  - Superior engineered software
  - Highest rated customer service

“Only Information Builders achieves above-average ease of use, below-average implementation costs per user, above-average support for complex deployments and above-average business benefits.”

- 36 years of expertise
- 1,350 dedicated professionals
- 60 offices worldwide
- Tens of thousands of customers
- Millions of users