Evaluation Blueprint
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Purpose

The purpose of the Solution Workshop is to determine solution fit—ultimately answering one primary question: based on your current state, future plans and critical requirements, is OnBase by Hyland a fit?

Today’s rapidly changing insurance environment and increasing expectations from your customers mean that transformation through technology is no longer a trend, its table stakes. And legacy systems can lock insurers into legacy processes resulting in poor customer experiences and higher than necessary costs. As information management and enterprise content management experts, we have helped hundreds of insurance companies become more efficient and effective.

This journey begins with a mutual discovery process in the Solution Workshop, where we assist in the assessment of your current state and where you’re able to expand your vision for what’s possible with our solution.

Goal

This workshop is a collaborative and consultative activity specifically designed to determine if our solution is a fit for your unique requirements and environment. It combines a half-day consultative discovery session and a current state assessment with a solution demonstration and discussion in order to create the context for what’s possible with OnBase.

Description

Our evaluation methodology has been refined from our experiences across hundreds of information management and enterprise content management evaluations with insurance companies since we began in 1991 with OnBase. This experience enables us to accurately assess your current state processes and products, and mutually determine if our solution is a fit based on your needs and your vision.

During this workshop, we will:

- Review and discuss current state processes, products, priorities and pains
  - Leveraging our pre-workshop scoping questionnaire (needs assessment), along with our dedicated Insurance Solution Consultants during the high level discovery session
- Discuss, define and document critical process & document management requirements
- Demonstrate what’s possible with OnBase based on current state assessment
- Share Insurance-centric customer success stories to create awareness and vision

Outcome

After the half-day Solution Workshop, the mutual milestone we are working to reach is an agreed upon consensus as to whether or not OnBase represents a high-level fit for your business.

Hyland will provide the following deliverables:

- High-level Estimate & Proposal (software, services, timeline)
- Solution & Product Summaries (education and awareness)
- Documented Customer Success Stories
- Proof of Concept or hands-on Solution Test Drive (if needed)
- Sample Solution Requirements or Evaluation Scorecard Criteria (if needed)

If we determine there isn’t a strong fit, then we would end the evaluation. But you have the confidence to know that the decision was vetted and validated in an efficient and effective manner.

If we determine there is a strong fit, then we would agree to continue the evaluation together and begin preparing for and planning the Value Workshop in order to determine the specific business case and ROI related to the proposed solution.
# THE SOLUTION WORKSHOP - SAMPLE AGENDA

## DAY 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic / Area</th>
<th>Objective</th>
<th>Customer Attendees</th>
</tr>
</thead>
</table>
| 9:00 – 9:30| Solution Workshop Kick Off & Introductions | Face-to-face introductions; Confirm stakeholder and sponsor’s objectives; Review Solution Workshop objectives and agenda with all stakeholders and participants; Open Q&A session  
Example: Review Underwriting organizational structure with management team; discuss SLA’s, bottlenecks, current issues/constraints, goals/strategies, metrics, other planned projects | Key Stakeholders from IT, Business and Executive Leadership                         |
| 9:30 – 11:00| Review Current State                  | Review and discuss current state processes, products, priorities and pains (both driven thru our scoping questionnaire and consultative discovery and discussion)  
Hyland to gain firsthand knowledge of focus area (underwriting transformation, new business optimization, claims, etc) by either observing, interviewing, discussing, or touring the work area and talking with key stakeholders and SMEs | Key Stakeholders from IT, Business and Executive Leadership                         |
| 11:00 – 11:30| Review Critical Requirements       | Discuss, define and document critical process & product requirements related to document intake/capture/OCR, document management, document production/creation/packaging, workflow (user-driven and system-driven), case management, electronic signatures, electronic forms, integration with core Policy Admin/Rating/Billing/Claims systems, security/storage/access, mobile document access/capture/workflow, enterprise file sync and share, cloud-based deployments | Key Stakeholders from IT, Business and Executive Leadership                         |
| 11:30 – 12:00| Break & Working Lunch               | Bring in lunch and begin solution demonstration and discussion during working lunch                                                                                                                       |                                                                                  |
| 12:00 – 1:30| Solution Demonstration              | Demonstrate what’s possible with OnBase based on current state assessment and future state vision that has been identified                                                                                   | Key Stakeholders from IT, Business and Executive Leadership                         |
| 1:30 – 1:45  | Wrap Up & Feedback                  | Discuss next steps, action items, and any additional required information. Discuss the central question related to the Solution Workshop, which is related to whether or not there is a product fit based on current requirements and environment | Key Stakeholders from IT, Business and Executive Leadership                         |
Purpose
Today’s insurance organizations are more complex than ever, with numerous competing priorities vying for resources. Determining which projects to implement can be challenging. As information management experts, we have helped hundreds of insurance companies become more efficient and effective in how they evaluate and prioritize potential projects.

Goal
This workshop identifies the expected value of deploying OnBase within your organization, allowing you to evaluate the OnBase project against other, competing projects. In addition to identifying the tangible and intangible benefits, the workshop will also determine how OnBase aligns with and promotes the company’s strategic goals.

Description
Our evaluation methodology is based on numerous on-site reviews conducted at insurance companies since 1991. This experience enables us to accurately assess your current state processes and estimate your expected benefits from an OnBase solution.

During this workshop, we will:
• Interview key management to understand your organization’s strategic and departmental goals/initiatives
• Interview management from the target business areas to better understand current state processes, constraints, SLA’s, and department objectives
• Observe work processes to gain deeper understanding of the current state, metrics, and constraints
• Evaluate current state processes against expected, future state processes to determine expected project value

Outcome
Approximately 1-2 weeks after the onsite visit, Hyland will provide the following deliverables:
• Value Assessment – includes expected costs, benefits, and overall ROI
• Value Workshop Report – includes a summary of the Value Assessment and recommended deployment roadmap
• Executive Presentation - Hyland will give an onsite presentation of the findings and recommendations

Upon completion of the Value Workshop, we will work in partnership with you to determine the appropriate next steps. Common choices include a Proof of Concept/OnBase Test Drive or an Implementation Workshop, which includes estimated implementation timelines, resource requirements, and a Statement of Work.
## THE VALUE WORKSHOP - SAMPLE AGENDA

### DAY 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic / Area</th>
<th>Objective</th>
<th>Customer Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 - 1:00</td>
<td>Hyland Travel</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1:00 - 1:30</td>
<td>Introductory Meeting</td>
<td>Face-to-face introductions; Confirm sponsor’s objectives; Review any last minute changes to the schedule; discuss logistics for the workshop</td>
<td>Main Customer Contact, Project Sponsor</td>
</tr>
<tr>
<td>1:30 - 2:30</td>
<td>Kickoff Meeting</td>
<td>Review objectives and agenda with all stakeholders and participants; Open Q&amp;A session</td>
<td>All Workshop Participants</td>
</tr>
<tr>
<td>2:30 - 3:30</td>
<td>Mail Room - observe handling of incoming mail</td>
<td>Understand how mail is initially received, opened, handled, and pre-sorted</td>
<td>Mailroom Staff</td>
</tr>
<tr>
<td>3:30 - 4:30</td>
<td>Mail Room - batching, sorting, scanning</td>
<td>Understand how the mail room is organizing various types of mail for scanning</td>
<td>Mailroom Staff</td>
</tr>
<tr>
<td>4:30 - 5:00</td>
<td>Status Meeting</td>
<td>Review progress for the day, discuss changes to the schedule, and review tomorrow’s meetings</td>
<td>Main Customer Contact</td>
</tr>
</tbody>
</table>

### DAY 2

<table>
<thead>
<tr>
<th>Time</th>
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<th>Objective</th>
<th>Customer Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 - 10:00</td>
<td>Claims Organization</td>
<td>Review Claims’ organizational structure with management team; discuss SLA’s, bottlenecks, current issues/constraints, goals/strategies, metrics, other planned projects</td>
<td>Claims Leadership</td>
</tr>
<tr>
<td>10:00 - 12:00</td>
<td>Observe Claims Processes</td>
<td>Hyland to gain firsthand knowledge of Claims process by touring the work area and sitting with claims personnel</td>
<td>Claims Front Line</td>
</tr>
<tr>
<td>12:00 - 1:00</td>
<td>Lunch</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1:00 - 3:00</td>
<td>Observe Claims Processes (cont’d)</td>
<td>Hyland to gain firsthand knowledge of Claims process by touring the work area and sitting with claims personnel</td>
<td>Claims Front Line</td>
</tr>
<tr>
<td>3:00 - 4:00</td>
<td>Claims Review</td>
<td>Hyland consultants meet with main Customer Contact to discuss observations; Determine if additional, follow-up Claims meetings or metrics are required</td>
<td>Main Customer Contact Project Sponsor (optional)</td>
</tr>
<tr>
<td>4:00 - 4:30</td>
<td>Status Meeting</td>
<td>Discuss next steps, action items, and any additional required information.</td>
<td>Main Customer Contact Project Sponsor (optional)</td>
</tr>
</tbody>
</table>
Purpose
Hyland has accumulated years of experience delivering successful, business-changing solutions in Insurance. Leveraging this experience, Hyland assists organizations making significant IT investment by further impacting TCO (Total Cost of Ownership) by reducing the time, cost and risk of implementing your information management solution.

Goal
Building on the outputs from Solution and Value workshops, Hyland experts will work with your project team to review project timelines, expectations and planned inclusions to design an implementation approach focused on maximizing results.

Description
The Implementation Workshop is founded in our team’s 10-plus years of experience delivering solutions in insurance. This experience is openly shared with your organization, translating peer successes and lessons learned into a successful OnBase implementation.

During this workshop, we will:
- Interview key program stakeholders to understand the current landscape, critical milestones and related success criteria
- Introduce Hyland’s methodology for insurance delivery, aligning it to core IT strategy
- Review and demo expected solution user stories
- Discuss team commitments and expected resource allocations
- Review high-level sprint plans, timelines and next steps to ready your program

Outcome
Approximately 1 week after the onsite visit, Hyland will provide the following deliverables:
- Services’ Proposal or Statement of Work to outline the expected engagement
- Updated Sprint Plan to incorporate discussed timelines and key milestones
- Updated RACI (Responsible, Accountable, Consulted and Informed) to define key program assignments across teams
- Sprint 0 or Sprint 1 Scheduling (if applicable)
# The Implementation Workshop - Sample Agenda

## Day 1

<table>
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<tr>
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<tr>
<td>9:00 – 9:30</td>
<td>Solution Workshop Kick Off</td>
<td>Face-to-face introductions; Confirm stakeholder and sponsor’s objectives; Review meeting objectives and agenda with all stakeholders and participants; Open Q&amp;A</td>
<td>Key IT, Business Stakeholders, Customer Project Team</td>
</tr>
<tr>
<td>9:30 – 10:45</td>
<td>Review Current/Planned State Expectations</td>
<td>High-level review to discuss current state products, processes, document intake/capture/OCR, document management and document production/creation plans; Discuss priorities, pains, SLA’s, current issues/constraints, goals/strategies, metrics, key milestones/dates and other items related to the planned project</td>
<td>Customer Project Lead/Sponsor, Customer PM, BA and/or SME, Customer OnBase Admin (TBD), Third party representative (TBD)</td>
</tr>
<tr>
<td>10:45 – 11:00</td>
<td>Break</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00 – 11:15</td>
<td>Introduction to Hyland’s Delivery Team and Methodology</td>
<td>Introduce Hyland’s delivery approach; Review the Hyland methodology; and Review planned project and related stages</td>
<td>Customer Project Lead/Sponsor, Customer PM, BA and/or SME, Customer OnBase Admin (TBD), Third party representative (TBD)</td>
</tr>
<tr>
<td>11:15– 12:15</td>
<td>High-Level User Story Review and Planning</td>
<td>Discuss expected (OnBase) user stories by Work Stream (e.g. Non-Integration, Integration, Inbound, Outbound, etc.)</td>
<td>Customer Project Lead/Sponsor, Customer PM, BA and/or SME, Customer OnBase Admin (TBD), Third party representative (TBD)</td>
</tr>
<tr>
<td>12:15 – 1:15</td>
<td>Lunch &amp; Break</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:15 – 2:45</td>
<td>High-Level User Story Review and Planning Continued</td>
<td>Discuss expected (OnBase) user stories by Work Stream (e.g. Non-Integration, Integration, Inbound, Outbound, etc.); and Review an initial high-level Sprint Plan aligned with expected project dates</td>
<td>Customer Project Lead/Sponsor, Customer PM, BA and/or SME, Customer OnBase Admin (TBD), Third party representative (TBD)</td>
</tr>
<tr>
<td>2:45 – 3:00</td>
<td>Break</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:00 – 4:00</td>
<td>Discuss Roles/Responsibilities Wrap Up &amp; Feedback</td>
<td>Review and discuss the OnBase RACI (Responsible, Accountable,Consulted, Informed); Discuss next steps (e.g. Sprint 0); Review any action items; and plan next steps</td>
<td>Customer Project Lead/Sponsor, Customer PM, BA and/or SME, Customer OnBase Admin (TBD), Third party representative (TBD)</td>
</tr>
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# Evaluation Blueprint Overview

**Customer:**

## Overall Purpose

1. Mutual discovery and agreement of requirements (needs & vision)
2. Collaboratively determine if our solution meets the need (fit & value)
3. Prepare the organization for the project (readiness)

## Solution Workshop

### Goal: The Why

- Do we need this solution?

  - Yes - On-site meeting to determine the business case (ROI) for the solution
  - No - End the engagement

### Description: The What

- High-level assessment of current state (people, processes, systems)
- Define high-level requirements
- Present what’s possible with the solution
- Share best practices from other customers
- Create shared vision of the solution
- Discuss internal procurement process

### Deliverables: The What

- On-site Discovery and Solution Demo(s)
- Documented requirements
- Budgetary Proposal
- Sample RFP (if needed)
- Solution Test Drive (if needed)

## Value Workshop

### What is the Value of this Solution?

- Review & prioritize strategic and tactical goals (corporate and departmental)
- Gather metrics on strategic/tactical goals
- Interview key stakeholders to understand current state & validate any assumptions
- Measure current state against future state & estimate the potential value (delta)

### Determine Value

- Yes - Meeting to review final solution scope and project plan
- No - End the engagement

## Implementation Workshop

### How do we prepare for this solution?

- Review implementation project plan and timeline
- Review customer resource requirements and training
- Review IT infrastructure requirements
- Finalize software licensing
- Finalize implementation statement of work (SOW)

### Determine Project Readiness

- Yes - Finalize contract agreement and begin steps to prepare for implementation
- No - End the engagement

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Last Modified Date: [Date]