The Resident Portal Roadmap

October 14, 2024
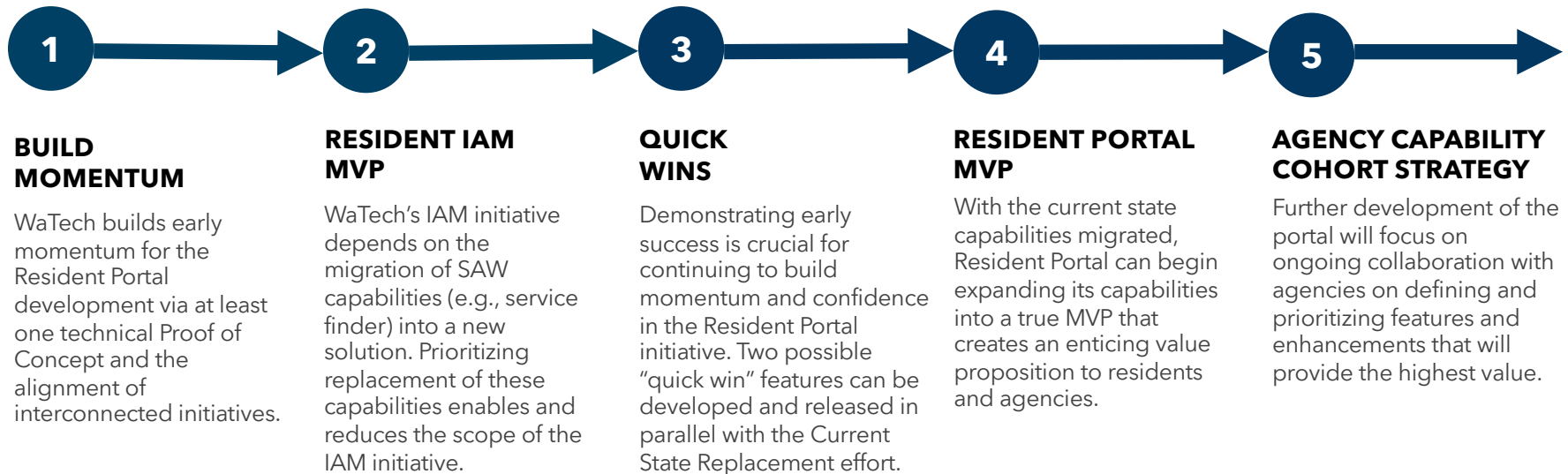
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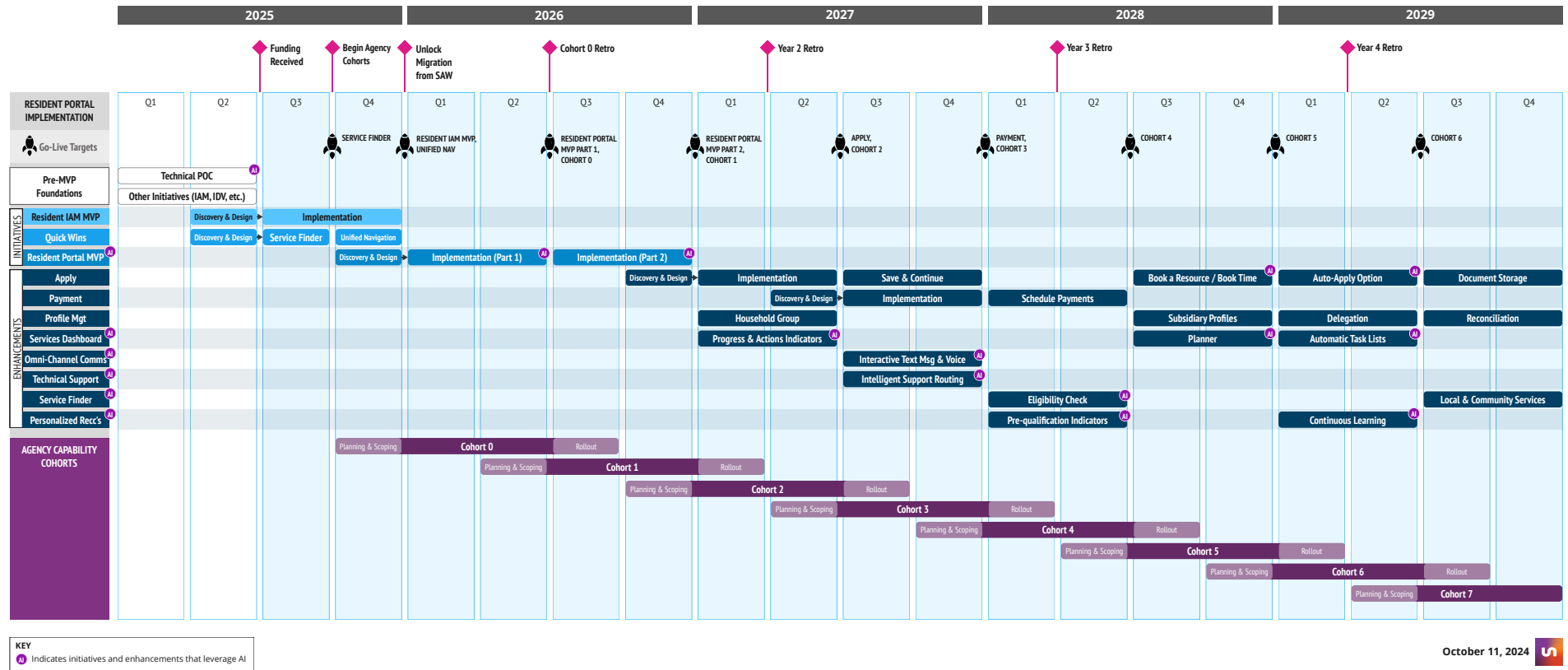# Resident Portal Implementation Strategy

1

BUILD MOMENTUM

WaTech builds early momentum for the Resident Portal development via at least one technical Proof of Concept and the alignment of interconnected initiatives.

2

RESIDENT IAM MVP

WaTech's IAM initiative depends on the migration of SAW capabilities (e.g., service finder) into a new solution. Prioritizing replacement of these capabilities enables and reduces the scope of the IAM initiative.

3

QUICK WINS

Demonstrating early success is crucial for continuing to build momentum and confidence in the Resident Portal initiative. Two possible "quick win" features can be developed and released in parallel with the Current State Replacement effort.

4

RESIDENT PORTAL MVP

With the current state capabilities migrated, Resident Portal can begin expanding its capabilities into a true MVP that creates an enticing value proposition to residents and agencies.

5

AGENCY CAPABILITY COHORT STRATEGY

Further development of the portal will focus on ongoing collaboration with agencies on defining and prioritizing features and enhancements that will provide the highest value.

*Please refer to the final Capabilities deliverable for additional detail about the capabilities included in each phase of the roadmap:
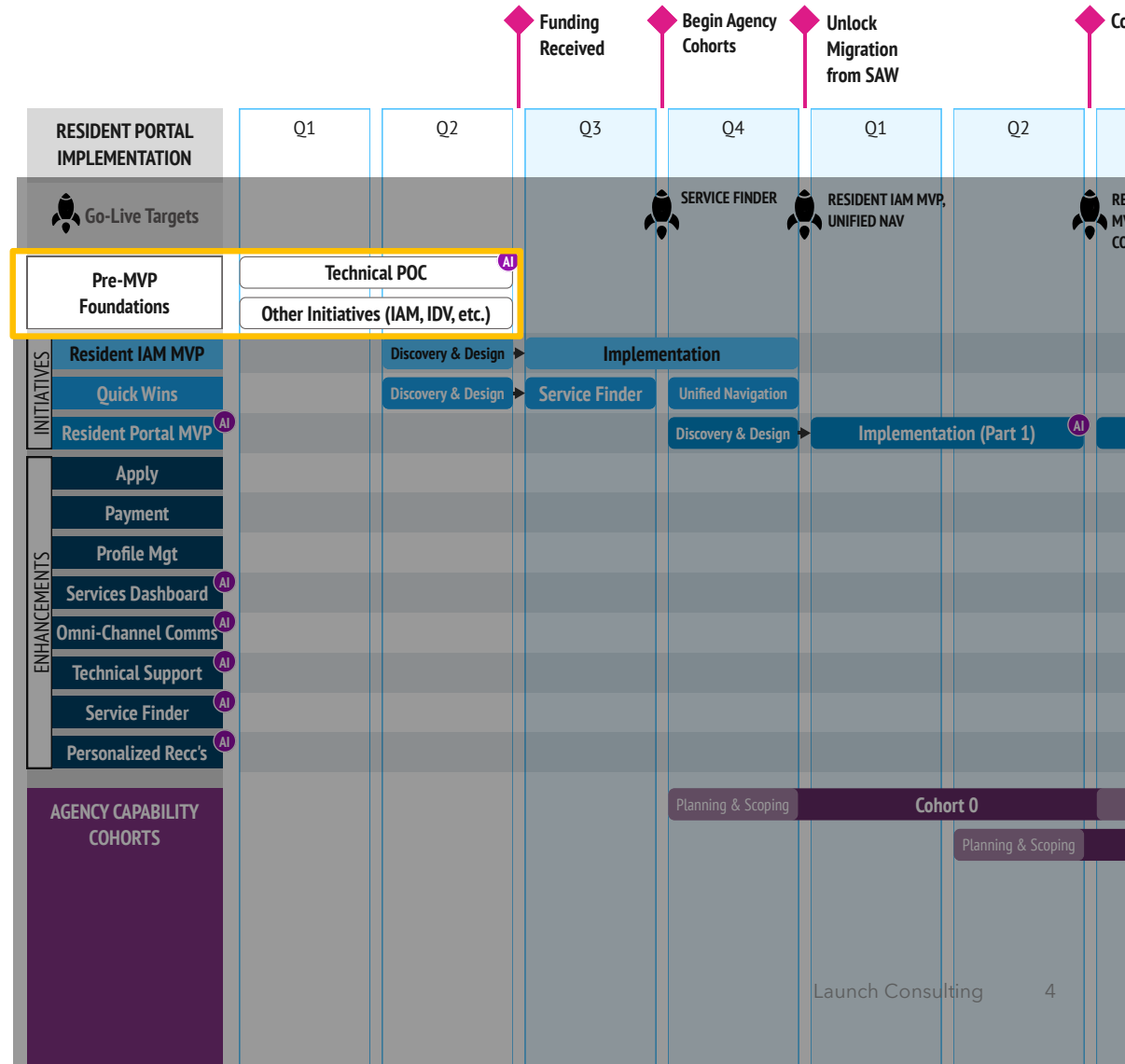
WARP Capabilities - Final draft-2024-09-27.xlsx

Resident Portal Roadmap: High-Level Sequencing

Roadmap timeline spanning 2025–2029 organized by quarters.

Milestones (pink markers): Funding Received; Begin Agency Cohorts; Unlock Migration from SAW; Cohort 0 Retro; Year 2 Retro; Year 3 Retro; Year 4 Retro

Go-Live Targets (rocket icons): SERVICE FINDER; RESIDENT IAM MVP, UNIFIED NAV; RESIDENT PORTAL MVP PART 1, COHORT 0; RESIDENT PORTAL MVP PART 2, COHORT 1; APPLY, COHORT 2; PAYMENT, COHORT 3; COHORT 4; COHORT 5; COHORT 6

RESIDENT PORTAL IMPLEMENTATION

Pre-MVP Foundations: Technical POC (AI); Other Initiatives (IAM, IDV, etc.)

INITIATIVES:
- Resident IAM MVP: Discovery & Design; Implementation
- Quick Wins: Discovery & Design; Service Finder; Unified Navigation
- Resident Portal MVP: Discovery & Design; Implementation (Part 1) (AI); Implementation (Part 2) (AI)

ENHANCEMENTS:
- Apply: Discovery & Design; Implementation; Save & Continue; Book a Resource / Book Time (AI); Auto-Apply Option (AI); Document Storage
- Payment: Discovery & Design; Implementation; Schedule Payments; Subsidiary Profiles; Delegation; Reconciliation
- Profile Mgt: Household Group
- Services Dashboard: Progress & Actions Indicators; Planner (AI); Automatic Task Lists (AI)
- Omni-Channel Comms (AI): Interactive Text Msg & Voice (AI)
- Technical Support: Intelligent Support Routing (AI)
- Service Finder: Eligibility Check (AI); Local & Community Services
- Personalized Recc's: Pre-qualification Indicators (AI); Continuous Learning

AGENCY CAPABILITY COHORTS:
- Planning & Scoping; Cohort 0; Rollout
- Planning & Scoping; Cohort 1; Rollout
- Planning & Scoping; Cohort 2; Rollout
- Planning & Scoping; Cohort 3; Rollout
- Planning & Scoping; Cohort 4; Rollout
- Planning & Scoping; Cohort 5; Rollout
- Planning & Scoping; Cohort 6; Rollout
- Planning & Scoping; Cohort 7

October 11, 2024

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1 Build Momentum

WaTech builds early momentum for the Resident Portal development via at least one technical Proof of Concept and the alignment of interconnected supporting initiatives such as IAM and IDV.
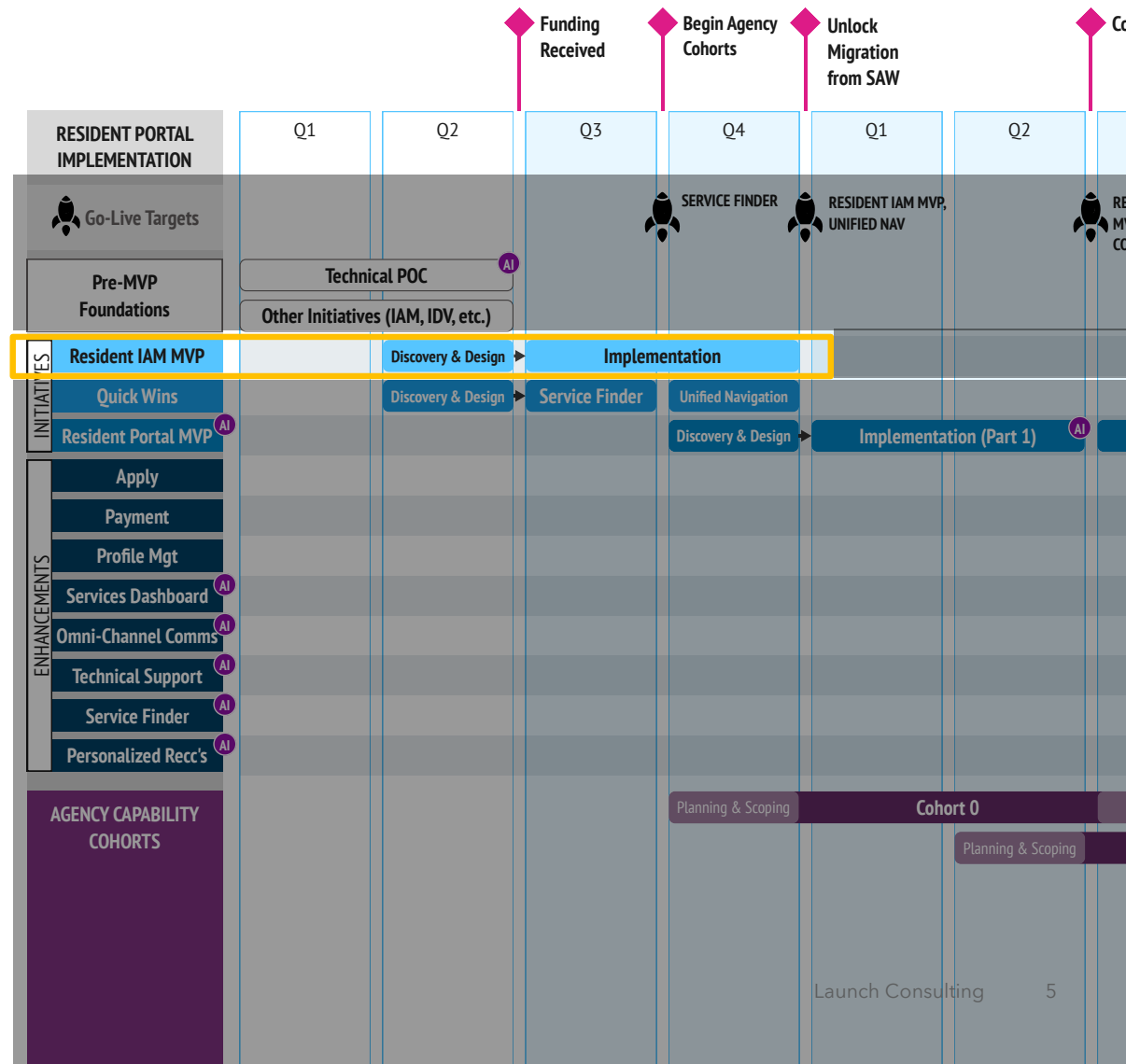
Milestone	Position
Funding Received	—
Begin Agency Cohorts	—
Unlock Migration from SAW	—
Co...	—

RESIDENT PORTAL IMPLEMENTATION	Q1	Q2	Q3	Q4	Q1	Q2	
Go-Live Targets				SERVICE FINDER	RESIDENT IAM MVP, UNIFIED NAV	RES MV CO	
Pre-MVP Foundations	Technical POC [AI]						
	Other Initiatives (IAM, IDV, etc.)						

INITIATIVES

	Q1	Q2	Q3	Q4	Q1	Q2
Resident IAM MVP		Discovery & Design	Implementation			
Quick Wins		Discovery & Design	Service Finder	Unified Navigation		
Resident Portal MVP [AI]				Discovery & Design	Implementation (Part 1) [AI]	

ENHANCEMENTS

- Apply
- Payment
- Profile Mgt
- Services Dashboard [AI]
- Omni-Channel Comms [AI]
- Technical Support [AI]
- Service Finder [AI]
- Personalized Recc's [AI]

AGENCY CAPABILITY COHORTS

	Q4	Q1	Q2
	Planning & Scoping	Cohort 0	
		Planning & Scoping	

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Resident IAM MVP

Starting with the disbursement of funds mid-2025, the Resident Portal will initially prioritize the replacement of the existing SAW capabilities that are outside of the IAM initiative's scope, such as Service Finder and profile management, with the goal of unlocking the ability for WaTech to begin migrating off of SAW in early 2026.

CAPABILITIES

- Create & Delete Resident Account
- Unique Resident Identifier
- Create & Manage a Personal Profile
- Browse, sort, and filter Services
- Find and contact an Agency

- Services Dashboard: See a List of My Services
- Technical Support
- Knowledge Base
- Share Resident Portal content with others
- Translation Support
- Consolidate/Transition SAW Accounts

Timeline/roadmap diagram: Resident Portal Implementation

Milestones: Funding Received, Begin Agency Cohorts, Unlock Migration from SAW

Go-Live Targets: SERVICE FINDER; RESIDENT IAM MVP, UNIFIED NAV

Pre-MVP Foundations
- Technical POC (AI)
- Other Initiatives (IAM, IDV, etc.)

INITIATIVES
- Resident IAM MVP: Discovery & Design → Implementation
- Quick Wins: Discovery & Design → Service Finder; Unified Navigation
- Resident Portal MVP: Discovery & Design → Implementation (Part 1) (AI)

ENHANCEMENTS
- Apply
- Payment
- Profile Mgt
- Services Dashboard (AI)
- Omni-Channel Comms (AI)
- Technical Support (AI)
- Service Finder (AI)
- Personalized Recc's (AI)

AGENCY CAPABILITY COHORTS
- Planning & Scoping → Cohort 0
- Planning & Scoping

Timeline columns: Q1, Q2, Q3, Q4, Q1, Q2

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Quick Wins

3

Demonstrating early success is crucial for building momentum and confidence in the Resident Portal initiative.

Parallel to the Current State Replacement effort, WaTech can gain early **quick wins** by focusing on two smaller features that will support anonymous users and begin to engage agencies in collaborating in the portal experience.

1. Service Finder
A preliminary unauthenticated experience that provides residents with links out to various agencies.

2. Unified Navigation
A reusable component and standard header for Agencies to add to their websites that links back to the Portal.
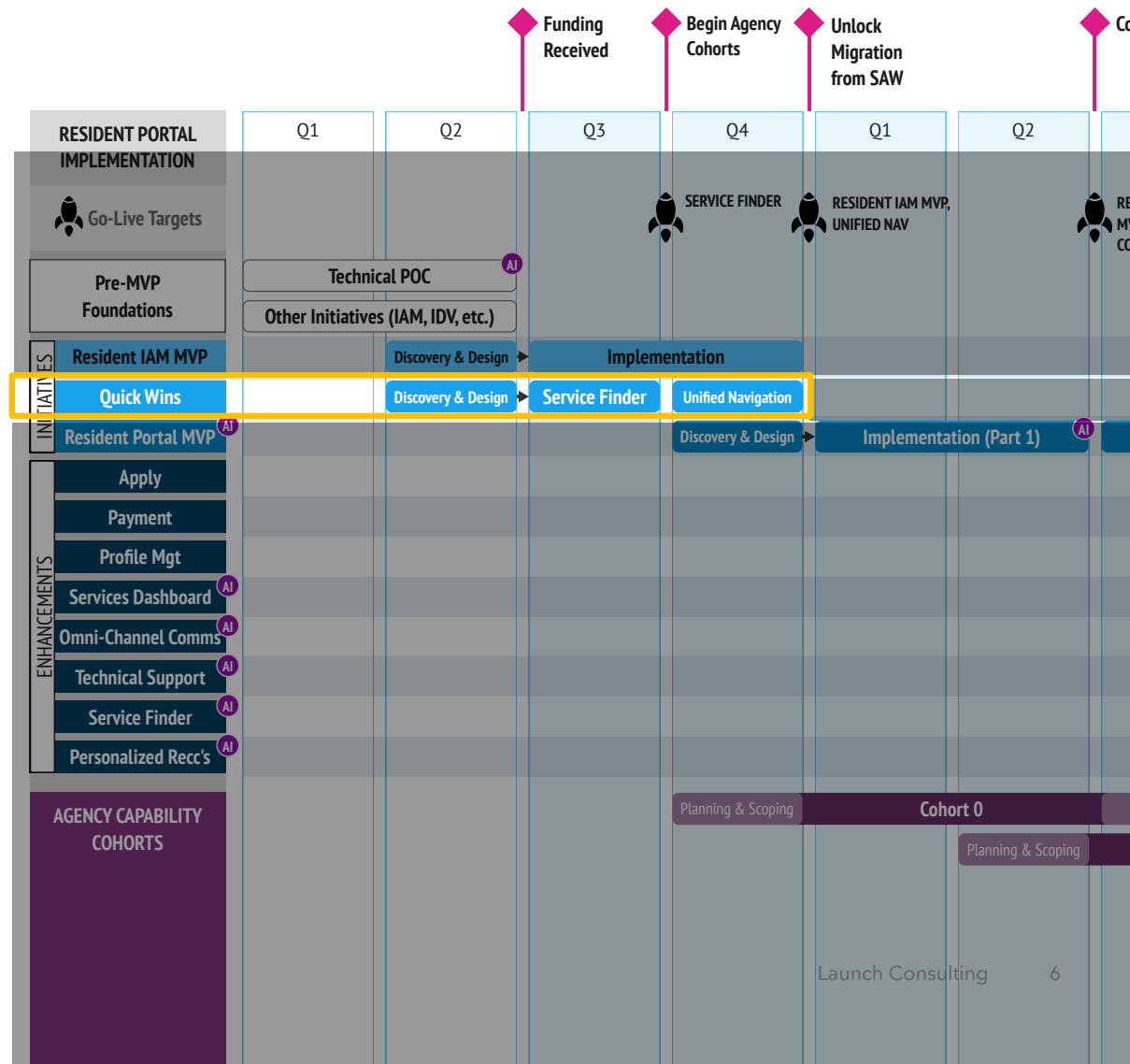
Resident Portal MVP

A set of initial capabilities and enhancements that create an enticing value proposition to residents and agencies. This phase overlaps Cohort 0 and Cohort 1 to indicate Agency collaboration and involvement.

CAPABILITIES

- Personalized service recommendations
- Automatic, proactive service recommendations
- Enriched services information
- Separate professional/business profile
- Services Dashboard: See the status of applications and services
- Single point of entry for technical support queries
- Alerts, updates, reminders, & notifications
- Enhancements to Favorites
- Personalized preferences (e.g. language & notifications)

	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4

Milestones: Funding Received, Begin Agency Cohorts, Unlock Migration from SAW, Cohort 0 Retro

RESIDENT PORTAL IMPLEMENTATION

Go-Live Targets: SERVICE FINDER; RESIDENT IAM MVP, UNIFIED NAV; RESIDENT PORTAL MVP PART 1, COHORT 0

Pre-MVP Foundations
- Technical POC (AI)
- Other Initiatives (IAM, IDV, etc.)

INITIATIVES
- Resident IAM MVP: Discovery & Design → Implementation
- Quick Wins: Discovery & Design → Service Finder → Unified Navigation
- Resident Portal MVP (AI): Discovery & Design → Implementation (Part 1) (AI) → Implementation (Part 2) (AI)

ENHANCEMENTS
- Apply — Discovery & Design
- Payment
- Profile Mgt
- Services Dashboard (AI)
- Omni-Channel Comms
- Technical Support
- Service Finder (AI)
- Personalized Recc's (AI)

AGENCY CAPABILITY COHORTS
- Planning & Scoping — Cohort 0 — Rollout
- Planning & Scoping — Cohort 1
- Planning & Scoping

Launch Consulting   7

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Agency Capability Cohort Strategy (1)

Beginning **Q3 2025** as part of the **Resident Portal MVP** initiative, WaTech will begin to use a long-term approach to implementation that actively seeks partnership and collaboration with state agencies for identifying, prioritizing, and implementing new Resident Portal features and enhancements.

Rather than investing time in features agencies won't use, the **Agency Capability Cohort Strategy** follows a three-stage approach:

1. **Cohort Planning & Scope Definition:** WaTech identifies a collection of new capabilities and a few partner agencies to collaborate with on their development. Together, WaTech and the selected partner agencies decide which capabilities are the most practical and highest value.

2. **Cohort Implementation:** WaTech and the partner agencies collaborate on the development and implementation of the selected capabilities.

3. **Cohort Go-Live and Rollout:** Once development is complete, the implementation goes live according to a go-live plan, the partner agency staff receives training, and legacy technologies are sunset.
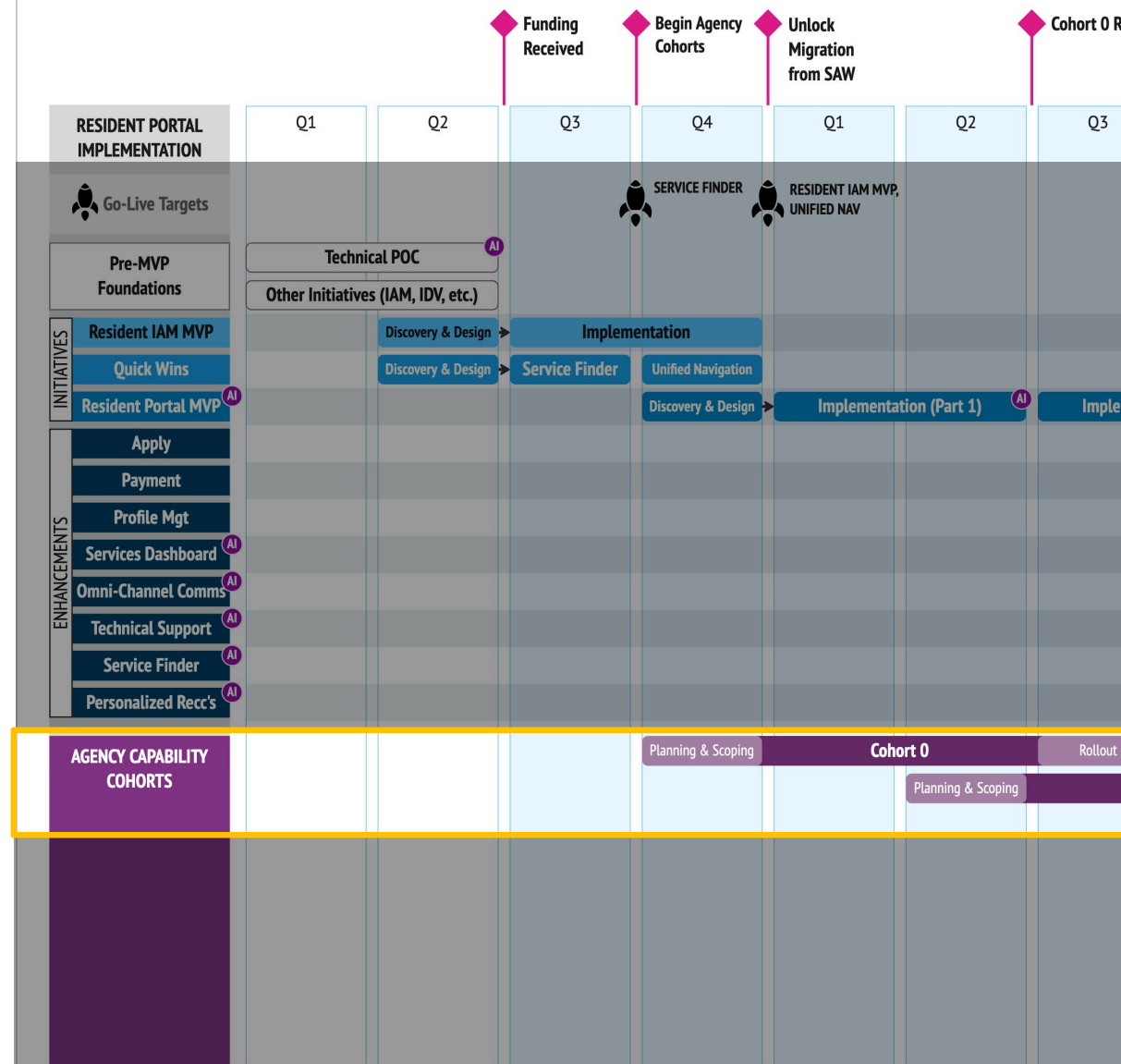
Looking Ahead: Agency Cohorts 2-7

While the sequence and specifics are likely to shift as the Resident Portal is developed, the features and enhancements currently earmarked for implementation as part of the Agency Cohorts 2 through 7 are as follows:

	Apply	Payment	Profile Mgt	Services Dashboard	Omni-Channel Comms	Technical Support	Service Finder	Personalized Recc's
Cohort 2	Initial implementation	n/a	Household Group	Progress & Actions indicators	n/a	n/a	n/a	n/a
Cohort 3	Save & Continue	Initial Implementation	n/a	n/a	Interactive Text Msg & Voice	Intelligent Support Routing	n/a	n/a
Cohort 4	n/a	Schedule Payments	n/a	n/a	n/a	n/a	Eligibility Check	Pre-Qualification Indicators
Cohort 5	Book a Resource / Book Time	n/a	Subsidiary Profiles	Planner	n/a	n/a	n/a	n/a
Cohort 6	Auto-Apply Option	n/a	Delegation	Automatic Task Lists	n/a	n/a	n/a	Continuous Learning
Cohort 7	Document Storage	n/a	Reconciliation	n/a	n/a	n/a	Local & Community Services	n/a

Thank You!