



RESPONSE TO:

Arizona Health Care Cost Containment System (AHCCCS)

AI Call Center Integration

Task Order # YH26-0031

Prepared by:

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January 8, 2025

IBM Consulting

IBM Consulting is honored to present this proposal to the Arizona Health Care Cost Containment System (AHCCCS) to implement an advanced, AI-powered customer-service platform that integrates ServiceNow Now Assist, ServiceNow GenAI, and Genesys Cloud CX.

Table of Contents

PART A1

 A1. Transmittal Letter 1

 A2 Signed Solicitation Amendment(s) 3

PART B.....4

 B1 Experience, Expertise, and Capacity 6

 B2 Method of Approach 18

The Complementary Workflow..... 21

Key Highlights 24

 B3 Solution Overview 32

 B4 Completed Requirements Matrix..... 39

PART C.....41

 C1 Separate, signed, Legal Analysis for Confidential /Proprietary Determination (if any)41

 C2 Exceptions to any part of task order41

PART A

A1. Transmittal Letter

Arizona Health Care Cost Containment System (AHCCCS)

Arizona Contract Number: CTR078109

Attn: Lisa Monreal
801 E. Jefferson Street
Phoenix, AZ 85034

Subject: IBM Consulting Proposal – AI-Powered- Customer Service Solution

Dear Ms. Monreal:

IBM Consulting is proud to submit our proposal to the Arizona Health Care Cost Containment System (AHCCCS) to design and implement an advanced, AI-powered customer service solution that transforms the Medicaid experience. This solution is built on IBM's:

1. Deep experience in healthcare, and more specifically Medicaid, modernization
2. Our proven ability to reimagine contact centers to reduce cost, automate tasks and improve member experience
3. Our award-winning partnership with ServiceNow and Genesys

You will see these consistent pillars alongside our commitment to delivering innovative, secure solutions that improve the lives of Arizona's residents—without disruption or drama.

IBM's partnership with the State of Arizona extends back more than half a century, supporting agencies and universities across the state in modernizing systems that serve citizens every day. Our work with Arizona's public institutions, including partnerships with the Department of Child Safety and the Department of Administration, reflects a shared commitment to improving access, efficiency, and trust in government services.

This tradition of partnership and innovation is particularly relevant to AHCCCS's initiative. IBM Consulting has extensive experience deploying ServiceNow and Genesys solutions in regulated healthcare environments and a proven record of integrating advanced AI capabilities to transform customer engagement. Our team understands the importance of combining technological innovation with responsible AI governance, regulatory compliance, and human-centered design to support the Medicaid community.

The proposal enclosed outlines IBM's comprehensive, integrated, and scalable approach leveraging **ServiceNow Now Assist**, **ServiceNow GenAI**, and **Genesys Cloud CX**—enhanced by IBM's accelerators and governance frameworks—to deliver a secure, compliant, and user-centric platform.

Our solution will:

- **Connect Members, Providers, and AHCCCS Staff:** Enable faster, more accurate responses across voice, chat, and SMS through AI-powered self-service and intelligent routing.
- **Empower Agents with AI:** Provide real-time insights and case summaries that help agents resolve inquiries quickly and accurately.

- **Help ensure Compliance and Trust:** Maintain HIPAA and state -level compliance through IBM's security -by -design architecture and responsible -AI governance.
- **Deliver Measurable Results:** Increase operational efficiency, reduce manual workload, and enhance satisfaction for members and providers alike.

Our proposal brings together IBM's public sector experience, technical depth, and unwavering commitment to AHCCCS's mission of streamlining healthcare administration and elevating customer service for all Medicaid stakeholders. We are confident that IBM's solution will provide AHCCCS with a secure, scalable foundation for continued innovation and improved service delivery.

We look forward to the opportunity to continue our longstanding partnership with the State of Arizona and to collaborate with AHCCCS on this important initiative. Please do not hesitate to contact us with any questions or to schedule a detailed discussion of our proposed solution.

Sincerely,



Kristen Conner | IBM Consulting Senior Partner

kristen.conner@ibm.com

(602) 481-6165

A2 Signed Solicitation Amendment(s)



TASK ORDER SOLICITATION AMENDMENT #2		
Task Order: YH26-0031 AHCCCS AI Call Center Integration	Solicitation Due Date: Thursday, January 8, 2026, 3:00 pm Arizona Time	Procurement Officer: Lisa Monreal Email: procurement@azahcccs.gov

A signed copy of this amendment must be submitted with your solicitation response.
This Solicitation is amended as follows:

Paragraph # or Title	Page #	Amendment
Task Order	1	The Proposal Due Date is revised from December 9, 2025, at 3:00 PM (Arizona Time) to January 8, 2026, at 3:00 PM (Arizona Time).
Attachment 1 AI Call Center Requirements Response Matrix	Global Requirements Tab	Global Requirements 97 (GR97) has been incorporated into the Requirements Response Matrix document.

The attached documents are hereby incorporated into this solicitation amendment.

1. AHCCCS Responses to the Questions and Answer Form; and
2. Revised Attachment 1 of the Requirements Response Matrix.

No other changes are being made at this time.

OFFEROR HEREBY ACKNOWLEDGES RECEIPT AND UNDERSTANDING OF THE SOLICITATION AMENDMENT	THIS SOLICITATION AMENDMENT IS HEREBY EXECUTED ON THE DAY, IN PHOENIX, AZ
SIGNATURE OF AUTHORIZED INDIVIDUAL: <i>Kristen Conner</i>	SIGNATURE: SIGNATURE ON FILE
TYPED NAME: Kristen Conner	TYPED NAME: Meggan LaPorte, CPPO, MSW
TITLE: Senior Partner, State of Arizona	TITLE: Chief Procurement Officer
DATE: January 8, 2026	DATE: December 8, 2025

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- 5.1. Please see Transmittal Letter in Part A.
 - 5.2. N/A. Solution is hosted on AHCCCS Azure tenancy
 - 5.3. N/A IBM will not be processing, storing or transmitting data from the Federal Hub.
 - 5.4. IBM will not be storing HIPAA regulated Data. All HIPAA regulated data will be store in AHCCCS owned and managed environments. IBM may need access to HIPAA regulated data. If this access is required, we will comply with HIPAA Regulations per the scope of our responsibility outlined in the SOW.

PART B

B1 Experience, Expertise, and Capacity

5.6.1. Specific experience, expertise and capacity of the firm with this type of initiative.

IBM Consulting brings unmatched experience and capacity to support AHCCCS in realizing its vision for an AI-powered customer-service platform. Our team combines decades of public sector healthcare modernization expertise, deep proficiency in integrated ServiceNow and Genesys configuration, and industry-leading capabilities in responsible artificial intelligence.

Across the United States, IBM Consulting has delivered secure, scalable solutions for state Medicaid agencies, health departments, and other public health organizations—helping them automate operations, enhance citizen engagement, and maintain strict compliance with federal and state regulations. Our work includes large-scale implementations of ServiceNow for case management and workflow automation, as well as Genesys deployments for multi-channel call-center modernization.

IBM's recognized leadership in responsible AI ensures that AHCCCS's new platform will operate transparently and ethically. Through our collaboration with ServiceNow Now Assist's GenAI and Genesys Cloud CX, we bring proven methods for model management, bias mitigation, and explainability—critical to maintaining trust in healthcare interactions.

Our delivery strength is supported by a global network of certified professionals, including ServiceNow Architects, Genesys Engineers, and AI Specialists, all guided by IBM's rigorous delivery methodology. This depth of talent allows IBM to mobilize quickly, scale as needed, and maintain continuous quality and security oversight throughout the engagement.

IBM and ServiceNow Strategic Relationship

500+
ServiceNow
Practitioners

5000+
IBM ServiceNow
Certifications, Micro-
certs & Accreditations

250+
IBM ServiceNow
Implementations



Capability Centers

IBM has ServiceNow expertise globally, with strategic skill hubs in NA, UK, France, Germany, Canada, Poland, India, Philippines, Romania, and China Capability Centers.

- Consulting
- Implementation
- Development
- Customization
- Integrations
- Orchestration/Automation
- Migration
- Managed Support Services

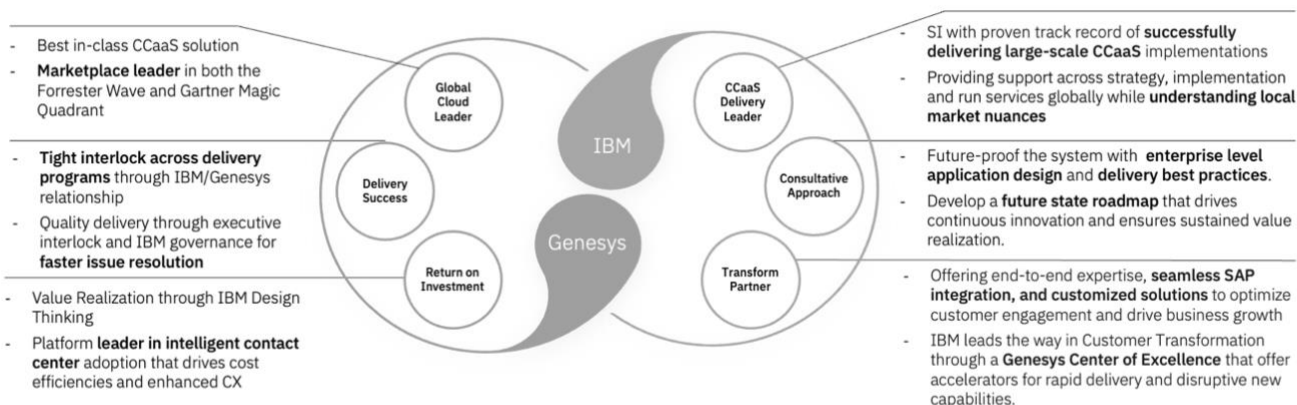
IBM is a Strategic Technology Partner with Global Certifications and Accreditations across all Product Lines.



- **Client Zero** - IBM is a **Top 10 ServiceNow client** globally for the Now Platform, with enterprise adoption of ITSM, HR Workflows, SPM, and SecOps including the IRM suite of products
- **Technology Alliance**: Co-created TxP, Watson Assistant, Cloud, and Security offerings with ServiceNow, and have 30+ integrations with IBM Technologies. **watsonx** models available in **ServiceNow**
- **12+ years** of experience in implementing and enriching ServiceNow with IBM assets and accelerators
- Best practices and tools: utilizing the **NOW create methodology** and **IBM Garage** driving efficiency and innovation
- Global Dynamic delivery model with ServiceNow practices in more than **20+ countries**



IBM and Genesys' **Platinum Award Winning Partnership**



IBM is the **Global Expansion Partner Award Winner** for Genesys Cloud CX



Combines Genesys' best-in-class platform with IBM's expertise on CCaaS customization



Provides AHCCCS with risk mitigation and accountability in both technology and delivery



Unlocks dual benefits of migration and transformation.

Experience

IBM's experience spans decades, with a proven track record of delivering thousands of successful projects that meet the unique needs of federal, state, and local government agencies. Our expertise in the public sector has equipped us with a deep understanding of the complex challenges our clients face. Our solutions are designed to be flexible, scalable, and secure, with a focus on improving outcomes and enhancing the constituent experience. Through all of our referenced projects, we bring lessons learned including the value of maintaining alignment with key stakeholders and sample end users throughout the full engagement; as well as the benefit of maximizing native capabilities to enable long-term sustainability.

We have proven our trusted delivery capabilities inside the State of Arizona, delivering innovative solutions on time and within budget while designing for AZ stakeholder needs. This includes supporting the transformative approach for Department of Child Safety where IBM partnered with the agency to reimagine processes, experiences, and capabilities supporting child welfare services. This included implementing gen AI capabilities to improve case worker efficiency and stakeholder experience.

As a long-standing ecosystem partner of ServiceNow, we have supported thousands of ServiceNow-based programs across sectors and geographies. As a long-standing ecosystem partner of Genesys, we have supported hundreds of Genesys Cloud-based programs across sectors and geographies. Furthermore, IBM's State & Local practice works across all 50 states with a deep focus on the digital transformation of a range of services, with a focus on improving constituent experience, driving impact, and reducing costs.

More examples of our experiences that directly align to AHCCCS requirements are outlined below, as brief case studies and outlined in a table that maps to RFP requirements.

Kenvue Case Management: ServiceNow and Genesys Implementation

Kenvue, formerly Johnson & Johnson's Consumer Healthcare division, collaborated with IBM to build its IT infrastructure. Kenvue faced a complex technology separation from J&J, including multiple contact center instances and low first-contact resolution rates. To address these challenges, Kenvue embarked on a transformative journey to implement a unified, cloud-based contact center solution. This project aimed to streamline operations, enhance customer experience, and reduce costs.

Kenvue's Global IVR offers a single-entry point for all voice interaction for its employees, suppliers and partners across various functions (like HR, Payroll, Expense Reporting, and Procurement). The new Global IVR function offers self-service and personalization in 9 languages and has been designed to expand support for future lines of business.

The project focused on unifying processes, improving agent desktops, and operational inefficiency by implementing a digital solution that integrates Genesys Cloud CX and ServiceNow. The all-in-one solution empowers agents to reduce average handling times by providing everything they need in a single, easy-to-access interface.



Key outcomes of this implementation included:

- Boosted efficiency and customer satisfaction by integrating Genesys Cloud and ServiceNow.
- Unified ServiceNow platform simplifies operations and enhances the agent experience.
- Single global IVR as the project has introduced a globally applicable IVR system, helping to ensure a consistent customer experience across 61 countries and for over 22,000 users.
- Integration between the ServiceNow Connector and Genesys Cloud, facilitating collaboration with third-party vendors and enhancing the CCaaS solution.



State of Florida Department of Health

IBM partnered with the Florida Department of Health (FDOH) to modernize its Medical Quality Assurance (MQA) program in charge of licensing all medical practitioners in the State, as well as the Women, Infant, and Children's (WIC) program that manages the benefit program of the same name. This included two AI-driven initiatives named ELI and Willow respectively. With the introduction of AI, the collaboration aimed to mitigate high call volumes, assist with program renewals, reduce errors and omissions, and address administrative burden to support Department staff in both programs, improving overall efficiency in serving Florida residents.

ELI and Willow were central to automating the manual, repetitive tasks that previously consumed significant time for case workers and Department staff. The primary outcome of ELI was focused on empowering call center agents to concentrate on more complex inquiries, such as nursing-related issues, and improving the overall customer experience by decreasing wait times. The integration of conversational AI via virtual assistants provided 24/7 self-service options, handling over 60% of inquiries through the AI engine. The automation of tasks such as appointment scheduling, eligibility screening, and document management reduced the burden on case workers, allowing them to focus on client needs and reach a larger number of eligible individuals.

The primary objective of Willow was to address the exceptional amount of administrative case management time that County based staff and social workers administering the WIC program were



spending, instead of coaching, counseling, and addressing the needs of their clients. Staff were answering phone calls to manage appointments, prompt clients to bring in forms, uploading documents, checking for eligibility, and many other tasks that were taking away from their mission of focusing on the clients. By automating these tasks, the goal is to improve client outcomes by improving benefits issuance, renewals, and allowing workers to focus on servicing their clients. Furthermore, Willow provided multi-lingual support in English, Spanish, and Haitian Creole and was responsible for reducing 3 million phone calls annually.

Both solutions included continuous improvement mechanisms. By mining conversation logs and analyzing user interactions, IBM was able to enhance the systems over time, ensuring the AI engines adapted and provided more accurate, reliable responses to inquiries. Additionally, both projects included knowledge transfer components. The ongoing maintenance and operations have been successfully turned over from IBM to the Department, which is fully capable of, and successfully managing each solution.

Key outcomes of these initiatives include:

- The collaboration between IBM and FDOH successfully achieved all project deliverables on time and within budget.
- The modernization efforts, backed by ELI and Willow, have significantly improved the WIC program's ability to serve Florida residents, reduced 3 million calls annually, while enhancing agency KPIs and operational efficiencies.
- FDOH now benefits from a streamlined, AI-powered system that supports both case workers and clients more effectively.

iA Financial Group

IBM designed and implemented a 3,000-seat contact center for iA Financial Group. In addition to providing ongoing support and operations for the Genesys platform, IBM has been enabling innovative features including integration with a custom CRM, implementing a voice-bot, and incorporating new digital channels. IBM is partnering with the client to integrate iA Financial Group's knowledge management platform (SharePoint) and to design an optimal approach for leveraging the new Genesys + ServiceNow Unified Experience. This solution will enable modern, streamlined capabilities within the contact center, improving efficiency, and enhancing the overall customer experience.

Key outcomes of these initiatives include:

- On time delivery of the Genesys solution for 13 lines of business
- Implemented a standardized design for easier support while incorporating targeted customizations for each line of business
- Enabled business users with self-service capabilities for activities that previously required IT tickets, improving efficiency and reducing operational overhead, and yielding a 73% reduction in service tickets, while increasing user experience.

- Resilient solution resulted in a 93% reduction in overall incidents reported in the contact center, including a reduction of sev 1 tickets from an average of 5 per year prior to cutover, to 0 on the new platform.
- Enablement of workforce management practices across the organization, improving volume forecasting, and agent adherence, resulting in better use of staff, and reductions in call wait times.
- The initial iteration of the voicebot improved identification and authentication of callers by more than 30%, allowing agents to address the customers' underlying needs faster, and with less friction.

Experience

IBM has extensive experience designing, implementing, and maintaining large, complex, enterprise-scale data and analytics systems for state government agencies—particularly in environments requiring secure data integration across multiple departments and programs. Our work spans health and human services, early childhood, public safety, and cross-agency data modernization efforts.

Tennessee Health and Human Services Data Ecosystem (TennCare)

IBM partnered with TennCare to implement a modern, cloud-native, enterprise data ecosystem supporting 12 initial data sources, hundreds of users, and real-time analytics for statewide program operations. The project included platform modernization, advanced analytics, AI readiness, and data governance frameworks. The system went live on time and on budget in April 2025. A key challenge faced was coordinating ingestion and harmonization of data from multiple state agencies with different data quality standards. IBM addressed this through a co-created data governance model, iterative validation cycles with program teams, and automated quality assessments integrated into the ingestion pipeline.

West Virginia Enterprise Data Solution (EDS)

For the West Virginia Department of Human Services, IBM modernized the state's legacy Decision Support System into an enterprise-wide, cloud-hosted data ecosystem supporting Medicaid, SNAP, TANF, and child welfare programs. The solution went live in March 2023 and received CMS certification in April 2024, confirming compliance, operational readiness, and foundational program integrity controls. A notable challenge involved modernizing decades-old legacy data into a scalable cloud environment while maintaining uninterrupted reporting for federal and legislative stakeholders. IBM mitigated this risk through phased migration, dual-run reporting, and close coordination with agency SMEs to validate transformed data.

North Carolina Statewide Analytics Platform

Since 2013, IBM has supported the implementation and expansion of North Carolina's enterprise analytics platform integrating Medicaid, managed care, child welfare, and social services data. The system has grown from one to more than ten enterprise data sources, supporting major policy transitions such as statewide managed care. Challenges included aligning data standards across MCOs and state systems. IBM resolved this by creating standardized ingestion patterns, shared data dictionaries, and robust MCO oversight dashboards. All major expansions were delivered on time within planned budgets.

AHCCCS Solution Component	Kenvue Genesys + ServiceNow	State of Florida ELI and Willow	IA Financial Group Contact Center	TennCare	West Virginia EDS	North Carolina Analytics Platform
Data Migration		X	X	X	X	X
Integrated Case Management Solution	X	X	X	X		
External and Internal User Profiles / Access Config	X	X	X	X		
Full Lifecycle Implementation, including Go Live and Production	X	X	X	X	X	X
Testing	X	X	X	X	X	X
Business Process and OCM	X	X	X	X	X	X
O&M Support	X		X	X	X	X

Expertise

IBM brings unique skills, capabilities, experiences, talent, and ecosystem relationships to address AHCCCS's immediate and long-term needs. Highlights of our key qualifications are provided below and further elaborated throughout our technical proposal.

- IBM is recognized as one of the world's most ethical (Ethisphere) and innovative (BCG) companies and has earned accolades from industry analysts as a leader in categories that include Digital Transformation, CRM, Customer Experience, AI, IT Implementation and Managed Services, among others.
- IBM is a Market-leading ServiceNow implementation partner with more than two decades of experience working directly with clients to unlock value from ServiceNow technology. IBM is recognized as a ServiceNow Elite partner, recognizing our global practice, depth of experience and quality of services delivered. In addition, IBM is a Gen AI Technology partner with ServiceNow, which has ServiceNow using WatsonX within the ServiceNow platform.
- As 'Client Zero' IBM is one of the largest consumers of ServiceNow, which highlights our transformations driving optimization across multiple functional areas, elevating the user experience and driving shareholder value.

- IBM is a global platinum partner in the Genesys Partner Program with 50+ active engagements across industries. We are recognized directly by Genesys leadership as one of the “largest and most successful integrators of Genesys Cloud solutions” globally.
- IBM is a leader in data transformation. We have successfully executed over 100,000 migration and modernization journeys for 600+ clients in 20 industries, across multiple cloud platforms.
- Cybersecurity is a core aspect of IBM’s focus as a trusted partner, working seamlessly with our clients to deliver security outcomes that accelerate time to value, protect existing investments, and build cyber resilience to address business needs. We are consistently ranked a leader by ISG and IDC MarketScape, including in the latest 2025 rankings.
- We have a robust library of pre-built, secure, and proven enterprise assets and accelerators that allow us to deliver more impactful solutions at a lower-risk and quicker time-to-value.
- With the IBM product engineering and co-innovation approach, we collaborate with AHCCCS experts to envision what's next, integrating technology foundations with agile methods and practice; this is critical because not only does it allow to address AHCCCS’s clearly articulated requirements, but it provides a framework for addressing future requirements.
- IBM employs a widely recognized asset-based consulting approach that brings together our proven methodology and AI-enabled accelerators to deliver more value, with better solutions, faster. These include a comprehensive set of tools designed to create a strong data foundation for any on-premises, cloud, or hybrid cloud environment with reduced time and cost.

Capacity

IBM is in the business of helping customers solve problems using advanced information technologies. We are a values-based enterprise of individuals who create and apply technology to make the world work better. More than 282,000 full-time IBM employees in over 175 countries invest and integrate hardware, software, and services to enable forward-thinking enterprises, institutions, and people. We create value for organizations through integrated solutions and products that leverage data, IT, deep expertise in industries and business processes, and a broad ecosystem of partners and alliances. Our solutions span all major industries including healthcare, government, financial services, and education among others. It is the diversity and breadth of our portfolio that uniquely separates IBM from other companies and uniquely qualify us to partner with AHCCCS on its Business Registry and Online Filing Systems Modernization RFP.

We understand what it takes to be successful in the state of Arizona and have consistently proven ourselves to be a trusted, high quality, low risk partner that addresses immediate needs in a pragmatic way that still allows for extensibility to future state requirements.

Highlights of our team and organizational capacity include:

- Our proposed team possesses deep, relevant experience enabling modernization programs in the public and private sector. We leverage a blend of highly skilled resources based in the US to deliver excellence and value.
- Kristen Conner, who leads our consulting services across Arizona, is a local resident with deep call center transformation expertise and direct relationships with ServiceNow and Genesys along with other relevant ecosystem partners.
- Linz Phillips, who currently oversees our active engagement with AHCCCS, expands his responsibilities to support the contact center transformation in partnership with leadership from our Customer Service Transformation practice (ServiceNow + Genesys) with proven results delivering on time and within budget.
- We will leverage skilled resources with over 5000 ServiceNow Certifications, 500+ ServiceNow Practitioners and 20 Certified ServiceNow Technical Architects.

- Our Genesys delivery team has 25+ years of experience delivering Contact Center Solutions, 250+ North American resources and has migrated over 100K contact center agents.
- Our team employs a common delivery model that will address AHCCCS's needs – and is focused on delivering value at speed to drive impact.
- As AHCCCS's needs evolve, we can flex in talent from the right parts of IBM – whether that be additional capabilities around advanced analytics, generative AI-enabled services, contact center automation, experience design, intelligent workflow, or deeper integration patterns.

5.6.2. List of names and classification of personnel expected to perform specific activities, including use of subcontractors.

Our team brings together specialized leadership and practitioners spanning all relevant disciplines, working together in a unified program approach proven successful across hundreds of engagements.

The team blends proven experience in all relevant domains – from Health & Human Services, Medicaid member experience, Arizona constituent services, ServiceNow, Genesys, trustworthy AI, security, and compliance. Our team has worked across initiatives of all sizes and complexities and understand how to maximize native capabilities for scalability and impact. Furthermore, this team understands how to work in partnership with AHCCCS stakeholders to unlock the vision and detailed requirements, collaborate to translate technical initiatives into actionable business value, and align to HHS-compliant workflows.

Together, this collective experience and innovative approach uniquely qualify IBM to support Arizona's modernization of Health and Human Services call centers, leveraging ServiceNow and Genesys GenAI for enhanced service delivery, operational excellence, and improved community outcomes.

Key Program Leadership

- **Kristen Conner** serves as the Senior Partner and Executive responsible for leading IBM's services across the State of Arizona. With over 20 years of experience at the intersection of technology, automation, and customer experience, Kristen has become renowned for driving innovation through the integration of AI, GenAI, and intelligent automation. Her leadership is characterized by a commitment to modernizing operations and delivering measurable results, particularly in the realm of contact center and customer engagement. Kristen built IBM's customer service and contact center transformation practice and brings deep expertise in the areas of direct relevance to this RFP including the ecosystem partner relationships.
- **Linz Phillip** is a proven leader already working successfully with the State of Arizona, including AHCCCS, to govern IBM's delivery of software development, complex program management, and gen AI-enabled innovation. Linz draws on his 25+ years of experience implementing high-impact solutions within the public sector and working across the Health and Human Services domain to deliver trusted outcomes. He brings a proven track record of leveraging data and technology to enhance customer satisfaction, drive revenue growth, improve operational efficiencies to drive productivity and reduce costs, and consistently empowers teams to surpass performance targets.

- **Karen Snyder** is a Health and Human Services Partner at IBM with more than 35 years of experience spanning state government, managed care, public health, and Medicaid operations. She is a recognized thought leader with deep expertise in policy, budgeting, strategic planning, and complex program administration. Before joining IBM, Karen served in multiple senior leadership roles across Florida's health and human services agencies, including Deputy Chief of Staff to the Governor, Chief of Staff at both the Agency for Health Care Administration and the Department of Health, and senior executive roles in managed care, where she oversaw multibillion-dollar budgets, led statewide program implementation, and shaped major policy initiatives. At IBM, she works closely with state and local governments to design and implement solutions that improve outcomes, enhance operational efficiency, and strengthen service delivery, while also providing strategic guidance and mentorship across client and internal teams.
- **Thomas Nisbet** is a nationally recognized leader in artificial intelligence, fraud prevention, and analytics for State and Local Government. As an IBM Partner, he leads AI enablement across IBM's State & Local government portfolio and has deep experience deploying conversational AI and intelligent workflows for Health and Human Services agencies across the United States. With more than two decades of experience, Thomas has delivered large-scale AI modernization initiatives, enterprise customer service transformations, and advanced fraud, waste, and abuse detection programs for organizations including the Florida Department of Health, the U.S. Census Bureau, the Social Security Administration, and multiple Medicaid programs. He specializes in guiding government agencies through their AI journey—from strategy to execution—to strengthen program integrity, improve constituent experiences, and enhance operational efficiency.
- **Jacob Melzer** is a **Contact Center Architect** with over 30 years' experience delivering Contact Center Transformation solutions. As part of IBM's global customer service transformation team he has been involved in IBM's partnership with Genesys and ServiceNow, as we defined the Genesys/ServiceNow unified Experience offering. Jacob has led complex implementations for call centers spanning US and global clients with experience enabling large and multi-platform call centers with as many as 12,000 agents. An example of this was his leading the Genesys Cloud adoption for Industrial Alliance Financial Group, where he designed and led the implementation of a Genesys Cloud implementation program for 13 lines of business, for agents using a wide variety of CRM platforms, including both ServiceNow (ITSM), as well as Salesforce, and unique, custom platforms.
- **Melissa Geissler** leads our Customer Strategy and Transformation practice for IBM's Public Market. Over the past 20 years, Melissa has partnered with large healthcare, government, and nonprofit organizations to lead high impact, cross-functional initiatives. Most notably, she has a proven track record defining and executing strategic service experience transformations as well as digital health initiatives that apply data-driven insights and innovative technologies as well as cross-industry success patterns. This includes leading the experience strategy and phase one implementation for a first of its kind conversational UX experience to support Medicare, Medicaid, and commercial healthcare members shifting away from manual and call-driven service, enabling members to engage in digital self-service at one of the nation's largest health insurance companies.

5.6.3. Experience and expertise of the proposed staff with this type of initiative.

Sample Profiles for Key Delivery Roles

- **Jeannette Evans** is a **Business Architect** and senior consulting professional with 18 years of experience supporting state and local government programs, with deep expertise in integrated eligibility systems at both the local and national levels. She has a proven track record of leading complex eligibility modernization efforts, managing business analysis teams, and ensuring policy and regulatory alignment across programs such as SNAP, TANF, Medicaid, and Child Care. Jeannette has served in key leadership roles where she successfully guided system enhancements, stakeholder coordination, and process improvements that elevated service delivery and program performance. Jeannette's expertise spans strategic planning, risk mitigation, requirements analysis, and user experience optimization, reinforced by a Masters in Management and multiple IBM digital credentials. She is recognized as a government thought leader committed to driving high-quality, client-focused outcomes on digital transformation initiatives.
- **Tiffany Ortega** is a seasoned **Project Manager** with 21+ years of experience supporting a variety of state Medicaid initiatives and leading complex technology modernization efforts. She is an expert at guiding technical teams through all phases of the project lifecycle, including initiation, analysis, design, development, testing, execution, and ongoing support. Tiffany's background includes strategic business requirements and product management responsibilities for population health applications, including Curam social management, where she has driven enhancements, managed multi-release delivery schedules, and led business analysis teams to improve quality and operational efficiency. Known for her strong communication, leadership, and stakeholder-coordination skills, she consistently delivers successful outcomes on high-visibility government programs, strengthened by certifications such as SAFe Scrum Master and AWS Cloud Practitioner.
- **Jen Pratt** is an accomplished **Business Intelligence and Analytic Consultant** with over 17 years of experience in Government Health and Human Services. She specializes in Medicaid analytics, data management, and CMS Certification, having led certification efforts across multiple states. Known for aligning analytic strategies with organizational goals, she has guided the development of data warehouses, reporting structures, and dashboards that strengthen data-driven decision-making. With IBM Consulting, Jen helps state agencies integrate advanced analytics and AI into their operations to improve efficiency and service delivery. Most recently, she partnered with the State of West Virginia to establish its AI Taskforce, creating a model other states can replicate. Her work reflects a blend of strategic insight, technical expertise, and a commitment to improving public-sector outcomes through data and innovation.
- **Akhil Vemela** is a **Sr. Developer** with 10+ years of experience working on the ServiceNow platform, with strong expertise across ITSM, ITOM, HRSD, BCM, GRC, CSM, OMT, and Source-to-Pay implementations. specialized in ServiceNow portal development and complex integrations, delivering scalable and user-friendly solutions aligned with business needs. Akhil holds multiple ServiceNow certifications, including CSA, CAD, CIS ITSM, CIS HRSD, CIS CSM, and CIS GRC, reflecting my deep functional and technical expertise. Most recently, he served as a ServiceNow SME for performance testing and working as a developer on AIOps, with a focus on platform stability, scalability, and intelligent operations.

- **Shannon Casha** is a **Sr. ServiceNow Architect** with over 26 years of experience in enterprise software delivery and more than 13 years specializing in ServiceNow. He brings deep expertise in designing and implementing complex, scalable solutions. He serves as the technical solution lead across all phases - owning end-to-end architecture, including scope, dependencies, estimates, staffing models, and delivery approach. He brings deep experience with complex ServiceNow implementations across HRSD, ITSM, PSM, Employee Center, Virtual Agent, Integrations, and Platform Security, supported by architecture blueprints and roadmaps aligned to address business objectives. He supports platform governance and enablement of security, access controls, and sustainable governance.
- **Klayton Miller** is a ServiceNow **Business Process Consultant** with a proven track record in requirements gathering, gap analysis, and process optimization to enable enterprise HR transformations. An expert in case management and experience enhancements, he excels at leading Agile teams, facilitating project workshops, and ensuring seamless ServiceNow deployments for global organizations. He has successfully led two large-scale enterprise implementations as Senior BPC and Project Scrum Master.
- **Lauren Jalilpour** is a **Medicaid Business Analyst** with extensive experience translating complex technical initiatives into clear business value for healthcare organizations. She transforms technical content into executive-level briefings, framing strategic use cases, architecture, and implementation pathways to elevate AI-driven outcomes. Her work includes guiding a \$2.5M global AI implementation by unifying 300+ requirements across 46 risk scenarios, designing Medicaid-compliant workflows for communicable disease management, and building scalable audit methodologies for state Medicaid programs. Additionally, she has delivered data-driven insights through exploratory analyses for payers managing \$4.2B in claims, positioning advanced analytics as a lever for revenue-cycle optimization and improving payer-provider alignment. These efforts consistently accelerate decision-making, strengthen compliance, and enable transformative, scalable solutions.
- **Chrystel Paulson** is a **Lead Service Designer** who specializes in SaaS software. With a refined approach grounded in Enterprise Design Thinking methodologies, she orchestrates interviews, workshops, and collaborative sessions, to define a vision that can be implemented with out-of-the-box capabilities to delight users. From ideation through development, Chrystel champions the users' journey, ensuring the successful adoption of SaaS tools including ServiceNow. With 10 years of experience as a designer and a portfolio of successful engagements, she enables success through collaboration with business stakeholders, architects, developers, and sponsor users. By challenging preconceptions and assumptions, she rigorously scrutinizes the features' benefits against user needs. Chrystel streamlines interfaces, alleviating cognitive burdens, and paving the way for seamless adoption. Her approach to building and implementing software enables strategic alignment with business imperatives underpinned by an unwavering dedication to user satisfaction and adoption.

5.6.4. A description of Experience, Expertise and Capacity of the proposed staff.

Collectively, our team possesses decades of leadership in government health and human services, with deep knowledge of Medicaid programs, eligibility systems, advanced analytics, applied AI, and packaged solutions like ServiceNow and Genesys. We have successfully led complex modernization efforts, managed large-scale technical and business analysis teams, and guided the implementation of AI-driven solutions to improve service delivery, compliance, and operational efficiency. Our team's capabilities span strategic planning, technical architecture, requirements analysis, user experience design, and stakeholder coordination that are reinforced by industry-leading certifications and proven success in deploying scalable, secure, and user-centric platforms. This breadth and depth of experience help ensure we have the capacity to deliver transformative, high-quality outcomes for AZ AHCCCS stakeholders.

5.11. Subcontracts: Offeror shall clearly list any proposed subcontractors and the subcontractor's proposed responsibilities in the Offer.

N/A - should IBM require onboarding subcontractors, we will work through the state and agency's approved subcontracting disclosures and compliance processes. At this point, IBM does not anticipate subcontracting services.

B2 Method of Approach

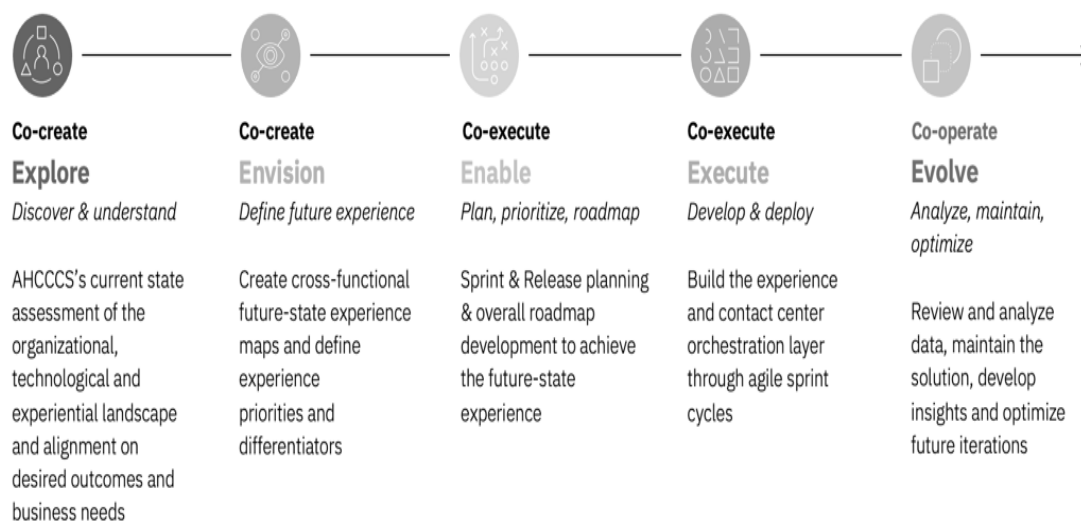
5.7.1. Proposed initiative management methodology and approach to fulfill the requirements of this initiative. (Limit 5 pages)

Project Phases & Deliverables

Proposed Experience-Led “IBM Garage” Approach

IBM Garage is a framework for accelerating digital transformations that weaves together Lean, Enterprise Design Thinking, Agile, and Modern Engineering practices with a razor-sharp focus on delivering value through measurable outcomes. We will utilize our proven **5E engagement approach** for this delivery to enables our cross-disciplinary teams—project management, technical architecture, design, development, change management— to work collaboratively with your team to conduct a consistent set of activities that yield the agreed-upon deliverables, all culminating in the desired outcomes and associated business impact.

IBM Garage Method: 5E Approach



Expected Outcomes of IBM's Garage approach

67%
faster speed to outcomes

10x
as many novel ideas

6x
as many projects into production

102%
average ROI for IBM Garage engagements

2x
more likely to achieve a successful rollout

* The Total Economic Impact™ Of IBM Garage, a commissioned study conducted by Forrester Consulting, October 2020

Requirements, Discovery, and Design: Our approach to requirements, discovery, and design is to stay aligned to AHCCCS's goals, keep the member experience front and center, and design a solution that makes the most of the platform with minimal customization.

Based on our experience delivering similar solutions, we can quickly guide AHCCCS stakeholders through discovery and design, help teams make decisions early, and move efficiently toward a shared, validated

solution design. This helps accelerate the overall build while keeping the focus on what matters most to citizens and end users.

We will work closely with AHCCCS stakeholders and representative users through focused discovery sessions to understand needs, priorities, and pain points. These insights inform user personas, solution design, and change management planning. We then hold targeted playback sessions to validate assumptions, confirm priorities, and refine the future-state experience before development begins.

The outcome of this phase is a clear Solution Blueprint that sets the foundation for delivery. It includes solution and architectural design, requirements and traceability, current- and future-state workflows, key risks, and an implementation roadmap. Time is built into the plan to review and validate these artifacts with AHCCCS stakeholders so the team can move confidently into development with a citizen-centered design. We have honed this approach across hundreds of engagements (including within the State of Arizona) to deliver real results, and as measured by Forrester's Total Economic Impact of IBM Garage – better-aligned stakeholders, faster speed to market, higher adoption, and improved ROI.

Our team will create a service blueprint to design the future state experience, starting with understanding the key organizational outcomes, co-creating the target state narrative, and then identifying the underpinning enablers within technology (ServiceNow and Genesys), processes, and data that will bring the experience to life.

The co-creation with end-users and key AHCCCS stakeholders is important for driving a user-value based backlog, reducing rework, and increasing member adoption. These blueprints were critical for success at Kenvue as well as our work at the State of AZ (child welfare).

Service Blueprint

Bringing a product to life

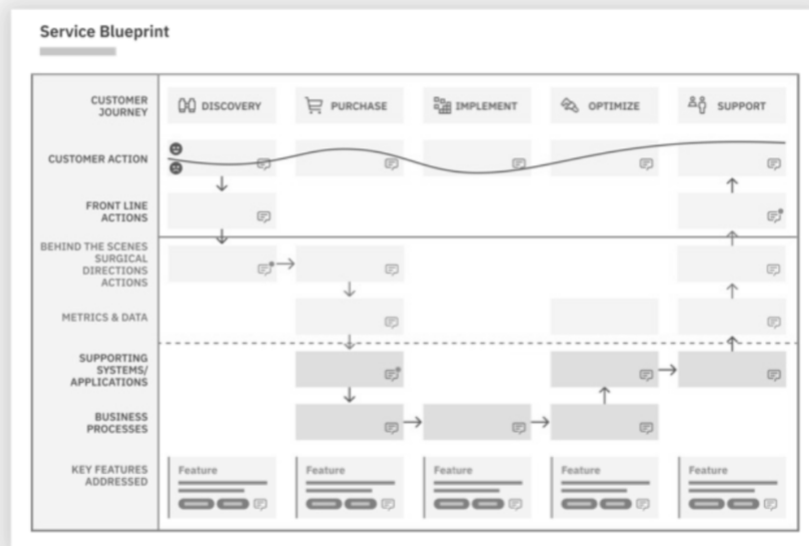
A Service Blueprint is a visual diagram that shows how various parts of a customer's journey connect. This includes people, practices, processes, data sources, and platforms that shape the user experience. It's a working document used to outline and improve experience and technology flows. It also helps us gain an end-to-end view of the desired customer journey. Typically, the Service Blueprint starts as an as-is analysis, then it develops into a to-be guide used to build the MVP.

10x

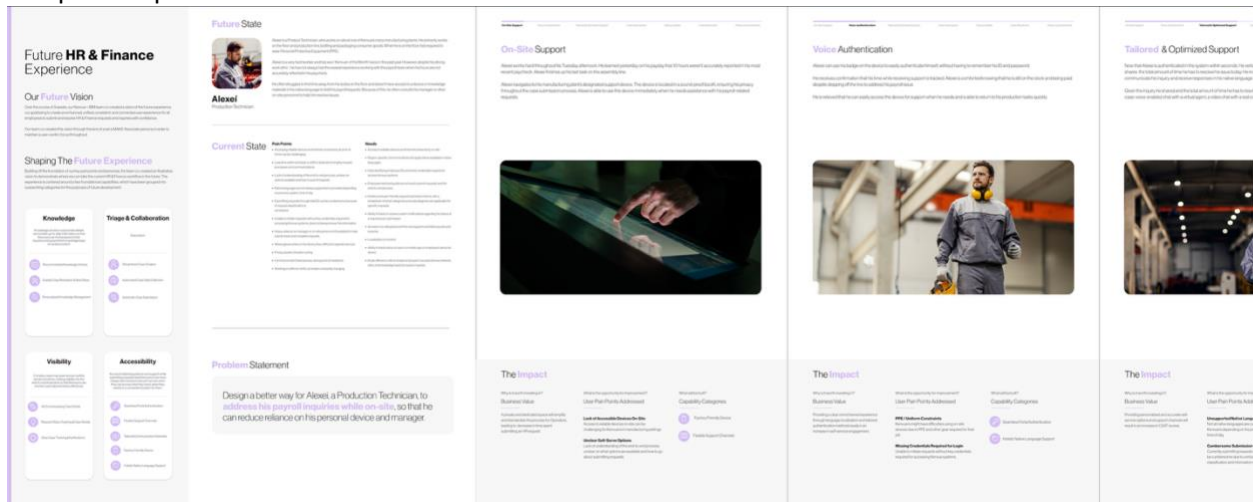
More ideas generated
with cross-functional
co-creation

6x

More innovative
projects completed
and released to market



Sample Blueprint



Configuration & Development: Building on the solution blueprint, our multidisciplinary team works together to finalize the technical design and supporting artifacts needed for delivery. This includes system and data design, security planning, data conversion and migration approach, and the logical and physical data models that guide configuration and development.

We use the solution blueprint as a living guide throughout configuration and development—starting with foundational setup and then delivering the highest-priority capabilities through a sprint-based approach. Requirements, gaps, and assumptions are reviewed and updated continuously, and capabilities are broken down into user stories that populate and refine the product backlog.

Work is delivered in two-week sprints, with user stories assigned based on agreed priorities. At the end of each sprint, we conduct demonstrations to show progress, validate configured workflows, and gather feedback early so adjustments can be made quickly.

Our ability to deliver efficiently is strengthened by proven accelerators, including the IBM Consulting Advantage toolset and pre-configured workflows aligned to AHCCCS needs. IBM Consulting Advantage brings reusable assets, automated delivery tools, and industry-informed methods that consistently improve implementation speed and quality across SaaS programs. These accelerators help reduce overall configuration and integration time, lower defect rates through standardized patterns, and accelerate data migration using repeatable toolkits. They also support faster environment provisioning and improved accuracy through validated design templates. With this foundation, we can move quickly and confidently through data migration, integrations with existing systems, and configuration of the new solution while maintaining a strong focus on quality, security, and the end-user experience.

Quality and Testing: IBM's quality assurance and testing approach is informed by our significant experience developing and launching large, complex, digital transformation programs. We build quality in at every step while following a structured set of testing that includes user acceptance, accessibility, regression and unit tests through manual and automated means. During the configuration activities, we work to produce a Test Management Plan that governs each phase of testing and then utilize requirements documentation to prepare test cases and test scripts. Furthermore, we leverage IBM's existing library of proven testing assets to customize the issue resolution tracking for end-to-end integration and user acceptance testing (UAT).

Reusable test assets are leveraged for system, system integration testing, end-to-end testing, performance testing, and user acceptance testing. We create test data to validate coverage and

understand dependencies across test modules, APIs, and external systems. Furthermore, we test for positive and negative scenarios at different levels (unit, system integration, and end-to-end tests).

To execute test planning, management and execution, we utilize a proven set of testing templates, assets, and tools to enable overall quality management and efficient execution of testing activities. This includes utilizing ServiceNow and Genesys greenfield testing capabilities to maximize coverage in both functionality, data, and automation as well as the ServiceNow Automated Testing Framework (ATF) accelerator and Selenium for test automation.

Through prior ServiceNow and Genesys implementations, IBM has created a leading progressive automation method that will enable continuous regression testing. Our testers use this framework to create optimized test cases. This solution can be extended to include AHCCCS's automated voice testing capabilities, or if none is presently in place at AHCCCS, IBM can provide a proposal to add a bespoke automated voice testing capacity.

Effectively, our proposed framework will bring the following values:

- Enhance test coverage with model-based testing techniques leading to defect prevention early in the lifecycle
- Minimize rework associated with test case design/modifications for incremental builds in Agile sprints
- Enable ServiceNow ATF and Selenium for test automation

User acceptance testing allows AHCCCS representative users to execute activities in the test environment before making the decision to release in production. AHCCCS is responsible for the leadership, coordination, execution, and overall success of User Acceptance Testing with their representative users. IBM will work collaboratively with the AHCCCS leader to analyze and remediate findings from UAT. Agreed to defects and vulnerabilities identified during this phase are documented, prioritized, and added to the product backlog as issues. The IBM team will work under the direction and priority of AHCCCS to manage and remediate these issues.

We will conduct usability testing as well as UAT to assess how easy the experience is to navigate for end-users. User Acceptance Testing and Usability Testing are the two pillars of user-centric validation, working together to help ensure a product is both functional and frictionless. While they are often confused, they serve complementary goals: UAT validates that the system fulfills the formal business requirements (the "what"), while Usability Testing validates the interface is intuitive and efficient for the human using it (the "how").

The Complementary Workflow

In a healthy development lifecycle, these tests act as a sequence of refinements:

1. **Early Usability Testing:** Identifies if a design concept is confusing before any code is written, saving the team from building features that users won't understand.
2. **Mid-Development Usability:** Refines the interface to confirm that complex tasks feel seamless.
3. **Final UAT:** Uses the nearly finished product to prove to stakeholders that every "must-have" feature is technically accurate and ready for production.

By combining them, we help ensure that the final product isn't just a technical success, but a practical one that users will actually enjoy using.

Feature	Usability Testing	User Acceptance Testing (UAT)
Primary Goal	"Is it easy to use?"	"Is it what we asked for?"
Focus	Intuition, efficiency, and satisfaction.	Requirements, workflows, and business rules.
Timing	Iterative; throughout the design process.	Final milestone; right before release.
Success Criteria	Low error rates, high task completion speed.	Compliance with "Acceptance Criteria."

The synergy between these two methods creates a "safety net" for the product launch. If you only perform UAT, you might release a system that technically works but is so frustrating that users abandon it. Conversely, if you only perform Usability Testing, you may have a beautiful, easy-to-use interface that fails to process data correctly or misses a critical business rule.

Governance and Organizational Change Management: Our proven governance and change management model underpins the delivery of the entire AHCCCS Contact Center delivery, across all tasks and phases. Our proposed multi-tiered joint governance model promotes sustained focus and responsiveness to AHCCCS's priorities by implementing a management structure and set of controls that emphasize transparency, trust, and quality. In addition, we infuse Organizational Change Management throughout. We focus on engaging stakeholders and preparing the organization for change across the full program lifecycle. Organizational Change Management (OCM) is important in preparing AHCCCS for this transformation, readying stakeholders for the associated change of embracing new workflows, capabilities, and experiences; engaging them throughout the journey and amplifying their voice to reinforce successful outcomes; and ultimately working to maximize value realization. Our OCM approach is designed to work closely with the AHCCCS team to support effective communications and training. By bringing users into the process from the beginning, as defined within the design activities, the organization is already primed once the solution is deployed. These early activities are critical inputs to completing the stakeholder analysis, communications plan, change impact analysis, and change network mobilization plan.

Training: Training is planned to complement our OCM activities defined above. While the solution is designed with end-users in mind and leveraging best practice experience design to maximize intuitive adoption, we recognize that training is a critical piece of any successful solution deployment and that training artifacts need to remain relevant across the system lifecycle. Our team will work collaboratively with the AHCCCS sponsor and project leader to finalize a training plan that covers the scope, objectives, schedule, tools, and artifacts comprising training. IBM will employ a "Train the Trainer" strategy to help ensure end-users are ready for launch. We develop and hone this content during the implementation phase to proactively address opportunities for improving end user ease of use and ultimately, system adoption.

Deployment and Hyper-care: We understand that even with the greatest focus on quality during configuration & development, it is imperative to plan for rapid issue remediation and incident management during the deployment and post launch period. Prior to Go Live, we work closely with the State to validate user roles, permissions, and readiness. Deployment starts with the right checklist and

Go Live Readiness Assessment that is conducted as part of the detailed Cutover Plan – with Go / No Go decision taking place at least 24 hours in advance of deployment. We prepare for all contingencies, including taking precautions and establishing protocol in the event that a rollback is required. We prepare the Release Management Plan and Hypercare or Initial Support Plan and take care to document full deployment results. All of this work sets the stage for subsequent hyper-care – where issues and incidents take top priority for rapid remediation. We apply proven methods to prioritize the defects and enhancements to optimize end user satisfaction, manage risk, and maintain a secure solution. A core component of hyper-care is robust release management practices that deliver code enhancement and issue bug fixes via planned releases on a periodic basis. Governance plays a critical role in focusing hyper-care efforts on the highest priority activities while the product backlog is an ongoing asset to maximize the value of the solution.

Proposed Approach to M&O Services Delivery

Maintenance & Operations (M&O): Effective M&O starts during the implementation phase with the right solution documentation, backlog of future enhancements, and detailed skills planning. During Hypercare, we validate the mapping of all capabilities, solution components, and unique skills to help ensure that every detailed solution component is cared for with clear accountability. We execute our transition plan that includes multiple weeks of overlap and co-execution for any implementation resources that are formally exiting the program. We also work to stagger roll-offs while setting expectations that all individuals who supported the program are on call in the event that additional support is required. We proactively test and validate that newly onboarded M&O team members are fully effective through our M&O checklist before we exit the transition.

Our M&O support is designed to deliver the right coverage, proactive planning, and ongoing operational support that dovetails with your existing Genesys and ServiceNow product support structures. This includes conducting operational monitoring, proactive planning, key and certificate management, scheduling and management of automating jobs, and post-warranty break/fix for bugs and defects. Furthermore, we have included capacity to assist with minor enhancements, data reviews, and report generation. We operate M&O with transparency, helping ensure that the State sees maximum value throughout the support phase. This includes flagging excess capacity that can be allocated to support state-prioritized enhancements. Definitions to categorize tickets, incident levels, and ticket priority are provided in the appendix as reference.

During the M&O phase, we also support ongoing activities for Disaster Recovery and Business Plan Continuity, working with our IBM program office to align to best practices for successfully supporting the state's needs without duplicating efforts already in place through existing Genesys and ServiceNow agreements. We will work with the state to test the DR/BCP plan at periodic intervals to align with available capacity while preparing for a variety of risk-driven scenarios.

Outgoing Transition Planning: As demonstrated through our prior engagements with Arizona and other government and commercial entities, our goal is to provide solutions and services that are well-documented, clearly understood, and sustainable for the organization. This is manifested in the detailed systems documentation, user guides, training materials, and transparent ticketing process utilized throughout delivery. Furthermore, our focus on maximizing native ServiceNow and Genesys capabilities and minimizing technical debt helps minimize risk associated with outgoing transition. We take deep

pride in our relationship with the State and are committed to working collaboratively with AHCCCS leadership to deliver a smooth transition should the State decide to change service providers in the outyears. We leverage our proven transition team to execute transition checklists that adhere to best practice for transitioning services, whether that be to internal employees or another vendor.

5.7.2. High level narrative description of how the vendor will satisfy each of the requirements in the requirements matrix. (Limit 5 pages)

Key Highlights

- **High compliance coverage:** Most requirements are marked **Meets Requirement**, with selective **Meets with Enhancement** and **Meets with Third Party Integration** where appropriate.
- **Omni-channel architecture:** Genesys Cloud for voice/IVR and ServiceNow CSM for digital channels, case/workflow, and agent experience.
- **Accessibility-first design:** ADA/WCAG-aligned, TTY/711 relay support, English/Spanish baseline (extensible to additional languages).
- **Intelligent operations:** Decision trees, Predictive Intelligence (Recommended/Next Best Actions), contextual knowledge surfacing, automated summaries.
- **Security & privacy by design:** MFA/SSO, RBAC/ACLs, encryption (TLS 1.2+/AES-256), audit trails, HIPAA/NIST/MARS-E alignment.
- **Performance & resilience:** DR targets (RPO ≤ 15 min, RTO ≤ 24 hrs.), service failover, SLA-driven response times and availability, real-time dashboards.
- **Continuous improvement:** Data driven optimization through surveys, analytics, trend and outage dashboards; version control and governance.

IBM Approach to AZ AHCCCS Requirements

IBM's approach to meeting AHCCCS requirements is grounded in delivering a secure, scalable, and innovative solution that enhances member and agent experiences while unlocking operational efficiency. We apply our IBM Garage approach to put user needs in focus and prioritize requirements that address real user needs. Our multidisciplinary team translates these user needs into an architecture and set of system-level requirements that maximize native capabilities from across ServiceNow and Genesys, ultimately reducing customization and avoiding complex solution governance challenges.

Agent Experience

IBM prioritizes empowering agents with intuitive, AI-enabled tools that streamline workflows and improve service quality. Leveraging Genesys Cloud and ServiceNow, IBM integrates generative AI capabilities to assist agents in real time, reducing handle times and improving accuracy. We bring benchmarks and success metrics from across our client portfolio to support the prioritization of capabilities that address value-driven needs. Features include:

- **Unified Interface:** A single pane of glass for case management, knowledge access, and communication.
- **AI Assistance:** Contextual prompts and automated knowledge retrieval to support agents during interactions.
- **Training and Enablement:** Built-in learning modules and guided workflows to accelerate onboarding and proficiency.

This approach allows agents to focus on delivering empathetic, efficient service to AHCCCS members.

Availability and Reliability

IBM's architecture is designed for high availability and resilience, hosted in the AHCCCS Azure environment. Key commitments include:

- **99.9% Uptime:** Redundant infrastructure and failover mechanisms to minimize downtime.
- **Disaster Recovery:** Comprehensive DR plans with automated backup and restore capabilities.
- **Continuous Monitoring:** Real-time health checks and proactive alerts to maintain system stability.

These measures guarantee uninterrupted service delivery and compliance with AHCCCS reliability standards.

Security and Compliance

IBM embeds security at every layer of the solution, supporting HIPAA and CMS compliance. Core elements include:

- **Data Encryption:** End-to-end encryption for data in transit and at rest.
- **Role-Based Access:** Strict access controls aligned with AHCCCS governance.
- **Audit Readiness:** Automated compliance reporting and audit trails for transparency.

IBM's security-first approach protects sensitive member data while meeting all regulatory obligations.

Integration and Interoperability

IBM maximizes native AHCCCS capabilities and supplements them with best-in-class integrations where needed:

- **API-Driven Design:** Seamless connectivity with AHCCCS systems and third-party applications.
- **Enhancement Strategy:** Clear documentation of any required modifications, including pricing transparency.
- **Testing Framework:** Rigorous validation of data flows and performance before go-live.

This supports a smooth transition and minimal disruption to existing operations.

Operational Support

IBM provides a robust support model to maintain system performance and user satisfaction:

- **24/7 Service Desk:** Dedicated support with defined SLAs.
- **Analytics and Reporting:** Dashboards for performance monitoring and trend analysis.
- **Continuous Improvement:** Regular reviews to optimize processes and enhance user experience.

IBM's response demonstrates a comprehensive approach to AHCCCS requirements, combining advanced technology with proven governance and operational rigor. By focusing on agent empowerment, system reliability, and secure integration, IBM enables AHCCCS to achieve its modernization goals while delivering exceptional service to Arizona constituents.

Detailed Narrative Overview:

IBM proposes an **AI-enabled, cloud-based contact center solution that unifies Genesys Cloud and ServiceNow Customer Service Management into a cohesive, enterprise-grade platform for omnichannel engagement**. Together, these technologies create a seamless ecosystem in which voice, chat, messaging, email, and portal-based interactions flow into a single, governed environment powered by automation, real-time analytics, and an accessible, secure architecture. This integrated approach provides members with consistent experiences across channels while delivering agents an intelligent, contextual workspace that consolidates all information required to resolve inquiries efficiently. IBM's proposal emphasizes configuration over customization, helping to ensure that the solution remains flexible, maintainable, scalable, and aligned with all compliance requirements, including ADA, WCAG 2.1 AA, HIPAA, HITECH, NIST, FIPS, Section 508, and OWASP security guidelines.

At the heart of the solution, **Genesys Cloud provides all core telephony and voice-related capabilities**, including inbound and outbound voice, IVR and natural language call steering, call recording, transcription, sentiment analysis, and voicebot functionality. Genesys capabilities are also utilized to manage workforce engagement, forecasting, scheduling, queueing, callbacks, and skills-based routing. Genesys product architecture supports multi-language experiences, real-time call treatment adjustments, integration with 711 relay services, and TTY/TDD interactions through compatible third-party gateways. Genesys applies modern call authentication mechanisms such as STIR/SHAKEN and can incorporate advanced call reputation or anti-fraud tools when required. As the front door to the voice channel, Genesys helps ensure that callers encounter efficient, natural, and intuitive entry points, whether speaking to a voicebot, navigating the IVR, or requesting a callback.

ServiceNow CSM serves as the system of record for all case-related data and orchestrates the workflows necessary to resolve customer inquiries. **The agent workspace consolidates customer context, interaction history, knowledge resources, SLA timelines, and guided workflows into a single pane of glass**. Guided decision trees, dynamic playbooks, and AI-powered recommendations help agents navigate complex interactions with consistency and accuracy. As agents work through tasks, the workspace automatically surfaces relevant knowledge articles, recommended next steps, similar previous cases, and contextual records. Alerts and SLA countdown timers indicate when cases require immediate attention, while AI-powered predictive indicators highlight where breaches may occur. Supervisors and managers gain real-time visibility into team workloads, assigned tasks, SLA performance, and operational bottlenecks.

Much of the solution's intelligence is driven by the **deep integration between Genesys and ServiceNow**. When a call arrives, Genesys identifies the customer's intent through natural language recognition, collects relevant information, and passes interaction metadata to ServiceNow through CTI events. ServiceNow can automatically create or update cases, populate fields with caller-specific or conversation-derived data, and present the appropriate workflows to the assigned agent. During the interaction, Genesys provides transcription, sentiment analysis, and call attributes, while ServiceNow gathers and analyzes real-time context, uses Predictive Intelligence to categorize and route work, and provides agents with AI-guided recommendations. After the call, wrap-up codes and notes synchronize between platforms, preserving full interaction history.

Accessibility is a foundation of the solution's design. ServiceNow Agent Workspace adheres to WCAG 2.1 AA guidelines with full screen reader compatibility, keyboard-only navigation, ARIA tagging, alternative text, focus indicators, and high-contrast modes. Text can be sized and content rearranged for accessibility needs. Customer-facing portals include these same capabilities, ensuring that all digital

interactions are equitable. Genesys supports 711 relay services for customers who use relay operators, and IVR behavior can be adjusted specifically to accommodate slower relay response times. While Genesys does not natively decode TTY/TDD traffic, it integrates cleanly with TTY/TDD gateways and continues to support accessibility through other channels.

Language support is rich and flexible across the platform. Genesys voicebots and IVR flows can be configured to speak, understand, and route calls in multiple languages. ServiceNow supports localization across all content, screens, notifications, workflows, and knowledge articles. English and Spanish are included at go-live, and additional languages can be added with predictable configuration effort. Routing rules in both platforms can direct interactions to bilingual staff or multilingual bots based on customer preference, call metadata, or profile data.

The agent experience is one of the strongest elements of the solution. ServiceNow's Agent Workspace offers a streamlined, intuitive interface that reduces the cognitive load for agents and improves productivity. Agents receive an immediate, contextual view of the customer, including demographics, active cases, prior contacts, related incidents, and open tasks. They can see SLA timers, colored indicators for priority, breach risk, and case aging, and alerts for new assignments or updated information. The workspace incorporates guided workflows through Playbooks and decision trees that provide structured, repeatable processes for complex interactions such as appeals, eligibility inquiries, provider status questions, and escalations. As agents progress through each step, the system automatically adjusts guidance based on previous responses. Agents can easily attach knowledge articles or related records to cases, document work notes, upload attachments, and collaborate via internal messaging. Internal collaboration threads can then be summarized through AI and inserted directly into the case record.

Genesys enhances the voice experience by providing agents with embedded controls for answering calls, initiating warm transfers, consulting with other staff, or setting disposition codes. Real-time transcription and sentiment indicators from Genesys can be made available to agents or supervisors depending on desired configuration. After calls, wrap-up codes and notes captured in Genesys synchronize automatically to the case in ServiceNow, ensuring that reporting reflects both telephony and case-handling activities.

Routing and work assignments are key strengths of the combined platform. Genesys handles all voice routing, using agent skills, proficiency scores, availability, handle time trends, and language to determine the best match. It supports capacity-based routing, dynamic re-routing to underutilized queues, and affinity routing that attempts to match customers with previously engaged agents. ServiceNow governs work routing for digital channels and back-office activity. It applies skills-based rules, workload balancing, SLA-driven priorities, and configurable business logic to direct cases to the most qualified agent or team. Managers can view real-time performance dashboards and manually rebalance workloads, escalate cases, or transfer assignments when needed.

Identity verification workflows within ServiceNow help ensure that sensitive or protected interactions follow strict authentication procedures. Verification methods include knowledge-based questions, multi-factor authentication, scripted agent-led verification, and integration with external identity proofing services. All verification attempts are logged with timestamps, agent IDs, and verification outcomes. The system can restrict access to sensitive data or prohibit certain workflow steps until the required identity checks are complete.

AI permeates both platforms and dramatically improves speed, accuracy, and customer satisfaction. Genesys uses natural language understanding to interpret caller intent and extract structured entities such as names, dates, and IDs. Its voicebots can engage customers in natural dialogue, ask clarifying

questions, and complete multi-step tasks. ServiceNow's Predictive Intelligence automatically categorizes and prioritizes cases, making routing more accurate and reducing manual triage work. Virtual Agent in ServiceNow provides conversational self-service for digital channels and can escalate to a live agent with the full context preserved. AI-driven Recommended Actions and knowledge suggestions surface the most relevant guidance to agents based on conversation content, case metadata, historical patterns, and sentiment. AI-generated summaries help agents and supervisors quickly understand case status, past actions, and next steps.

Session continuity across channels is a key architectural advantage. Customers who begin in a digital channel such as chat can move to voice without losing context. ServiceNow maintains unified transcripts of live chat, email threads, portal messages, and bot conversations. Genesys can provide phone interaction transcripts, and ServiceNow can combine these into a cohesive interaction history. This continuity allows agents to quickly understand what occurred before a live interaction, reducing customer frustration and improving resolution times.

Self-service is a major pillar of the solution. ServiceNow provides a fully configurable self-service portal that includes personalized dashboards, knowledge search, FAQs, request forms, appointment scheduling, and case tracking. Virtual Agent is embedded directly into the portal and can also be deployed through ServiceNow Engagement Messenger into third-party sites or mobile apps. Engagement Messenger supports custom branding, event-based triggers, contextual launches, and secure SSO authentication. Customers can schedule walk-up or virtual appointments, check in using kiosks, and view queue positions in real time. All portal components are responsive and accessible.

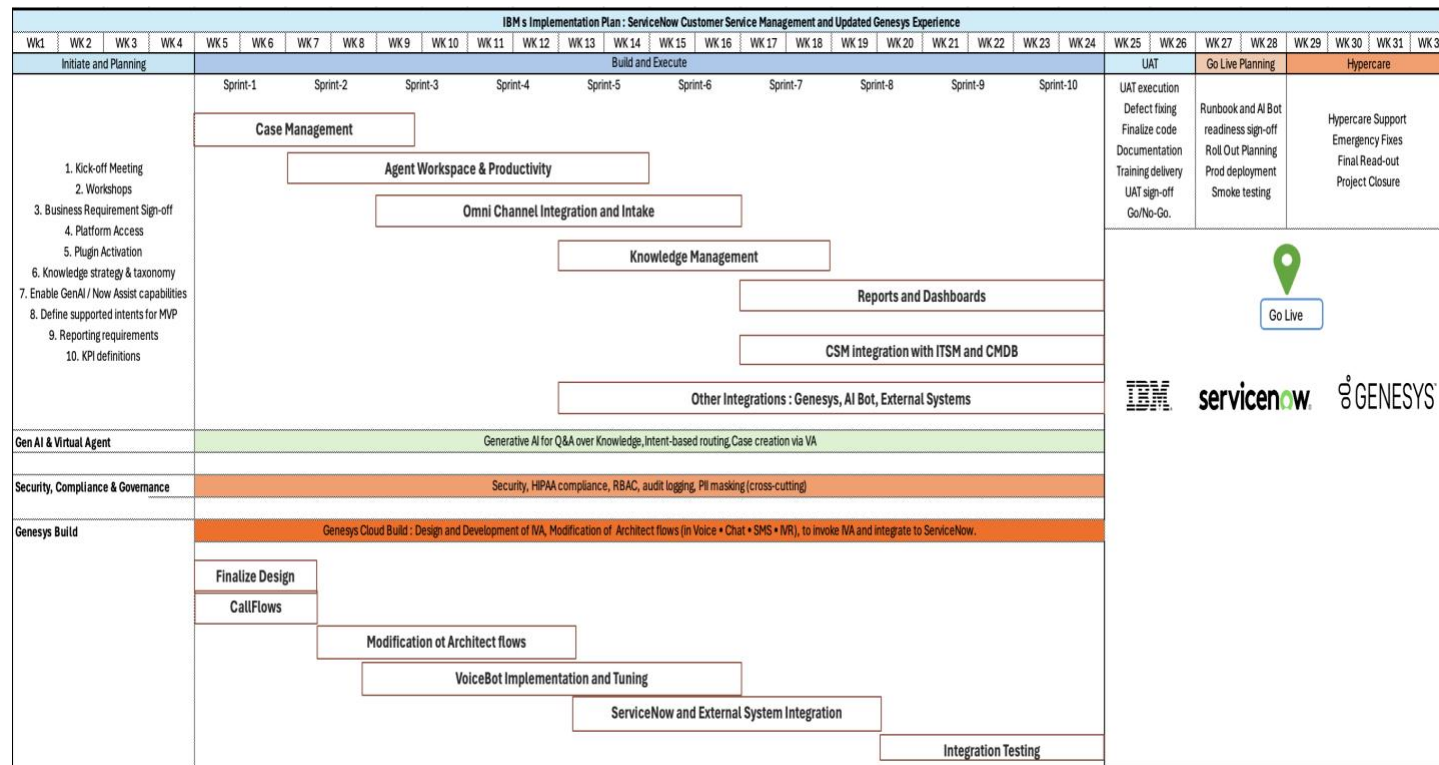
Knowledge management is tightly governed to facilitate accuracy and consistency. Articles undergo periodic review, approvals, and retirement processes. Feedback from agents and customers feeds directly into continuous improvement cycles. AI-driven analytics highlight which articles resolve issues most effectively and which require updates.

Reporting and analytics span both platforms. Genesys provides real-time dashboards that display call volume, queue depth, handle time, abandonment rate, agent performance, bot containment, sentiment analysis, and routing effectiveness. ServiceNow complements these with analytics for case volume, SLA compliance, backlog trends, workload distribution, knowledge usage, workflow bottlenecks, and process optimization. Predictive Intelligence identifies emerging trends such as surges in specific inquiry types, potential outages, or policy confusion. Both platforms offer exportable reports, scheduled distributions, and executive summaries.

Compliance, security, and governance are built into every layer of the architecture. The solution supports SSO authentication, MFA, field-level encryption, TLS 1.2+, granular role-based access controls, audit logs, and integration with SIEM platforms through standard logging formats. ServiceNow maintains compliance through strict data-handling protocols, encryption at rest and in transit, attachment encryption, and compliance with HIPAA's minimum necessary standards. Genesys supports encrypted voice recordings.

5.7.3. High level proposed schedule to meet the objectives for AHCCCS anticipated timeline for implementation.

High-Level Project Plan



Project Plan Summary

The plan spans from **April 1, 2026 to November 6, 2026** (~32 project weeks, with go-live at the end of Week 28, followed by four weeks of hypercare).

Objectives

- Deploy ServiceNow CSM core capabilities (case lifecycle, SLAs/entitlements, assignments, escalation).
- Enable Agent Workspace productivity (layouts, contextual panels, knowledge integration, notifications).
- Stand up Knowledge Management (KB structure, templates, categories, visibility & consumption for bot/agents).
- Build Omni-Channel intake with ServiceNow as system of record (case creation/update APIs, transcript/context ingestion, channel handoff).
- Integrate CSM with ITSM/CMDB (Incident/Problem/Change, CI association, Asset references, cross-process reporting).
- Deliver GenAI & Virtual Agent in ServiceNow: Configure intent-based routing, case creation via VA, agent assist (answers & summaries), and Quality Assurance over knowledge.
- Implement Genesys Cloud Virtual Agents to deliver on key AHCCCS use cases, and modify Architect flows to invoke virtual agents and integrate with ServiceNow across Voice, Chat, SMS, IVR.

Scope of Work & Workstreams

Workstreams

1. Case Management (CSM Core) — configuration of lifecycle/states, categories, priorities, SLAs/entitlements, assignments & escalations.
2. Agent Workspace & Productivity — workspace layouts, contextual panels, knowledge & related records, notifications, agent actions.
3. Knowledge Management — KB structure, templates, categories, user criteria/visibility, bot/agent consumption.
4. Omni-Channel Integration & Intake — case creation/update/status APIs, transcript/context ingestion, channel handoff validation.
5. CSM ↔ ITSM/CMDB Integration — Incident/Problem/Change linkages, CI/Asset association, visibility/reporting.
6. Other Integrations — Genesys, AI Bot, external systems; coordinated development & E2E testing.
7. GenAI & Virtual Agent — VA enablement; knowledge Q\&A; intent-routing; case creation; agent assist; thresholds, fallback/escalation.
8. Reporting & Dashboards — operational, experience, and agent productivity views.
9. Genesys Build — IVA design/development; Architect flow modifications across channels; ServiceNow integration.
10. Security, Compliance & Governance — HIPAA, RBAC, audit logging, PII masking (cross-cutting).

Approach & Methodology

The plan is organized into phases with a sprint 0 for initiation and planning, followed by ten agile development sprints across ~6 months:

- **Initiate & Planning** — kick-off; planning + deep-dive process workshops; business requirements sign-off; platform access; plugin activation (CSM, Knowledge, Virtual Agent); knowledge strategy & taxonomy; enable GenAI/Now Assist; define supported intents for MVP; reporting/KPI definitions; user story creation & sign-off.
- **Build & Execute (Sprints)** — configuration/customization across all workstreams; integrations (ServiceNow APIs, ITSM/CMDB; Genesys IVA + Architect flows); sprint reviews & adjustments.
- **UAT Prep & UAT** — UAT execution/coordination; defect fixing/retesting; code/config freeze; documentation finalization; training; UAT sign-off & Go/No-Go.
- **Go-Live Planning & Deployment** — runbook sign-off; update set packaging/promotion; production deployment; smoke testing.
- **Hypercare** — hypercare support; emergency fixes; final read-out; project closure.

Timeline

- Project window: April 1, 2026 → Nov 6, 2026 (dates present for Mondays and Fridays; ~33 distinct project weeks).

Key Deliverables

- Requirements baseline (workshops, BRD sign-off; user stories created/signed-off).
- Configured ServiceNow CSM (case lifecycle, categories/priorities, SLAs/entitlements, assignments/escalations).
- Agent Workspace layouts + contextual panels + knowledge integration.
- Knowledge Management (KB structure/templates/categories; consumption enablement for VA/agents).
- Omni-Channel Intake APIs and handoff validation; transcript/context ingestion.
- ITSM/CMDB Integrations (Incident/Problem/Change; CI/Asset association; cross-process reporting).
- GenAI & Virtual Agent capabilities (knowledge Q&A, intent routing, case creation, agent assist, thresholds/fallback).
- Genesys Cloud IVA + Architect flows integrated with ServiceNow across Voice/Chat/SMS/IVR.
- Training & Runbooks; UAT sign-off & Go/No-Go; Update set packaging/promotion.
- Production deployment & smoke testing; Hypercare with emergency fixes; Final read-out & closure.

Governance, Security & Compliance

- Cross-cutting governance for HIPAA, RBAC, audit logging, PII masking across all workstreams.
- Runbook approvals prior to deployment; Go/No-Go checkpoints; final read-out and closure.

High-Level Schedule

- **Months 1:** Initiation & planning; platform access; plugin activation; BRD/user stories; GenAI/Now Assist enablement; MVP intents; reporting/KPI definitions.
- **Months 2–6:** Build/execution across CSM, Workspace, Knowledge, Omni-Channel, Integrations, Genesys IVA/Architect flows; sprint reviews, completion of integration testing.
- **Month 7:** UAT prep & execution; defect resolution; training; sign-offs; deployment readiness, production deployment & smoke test, and go-live.
- **Month 8:** Hypercare.
- **Overall dates:** April 1, 2026 → Nov 6, 2026 (~32 project weeks).

B3 Solution Overview

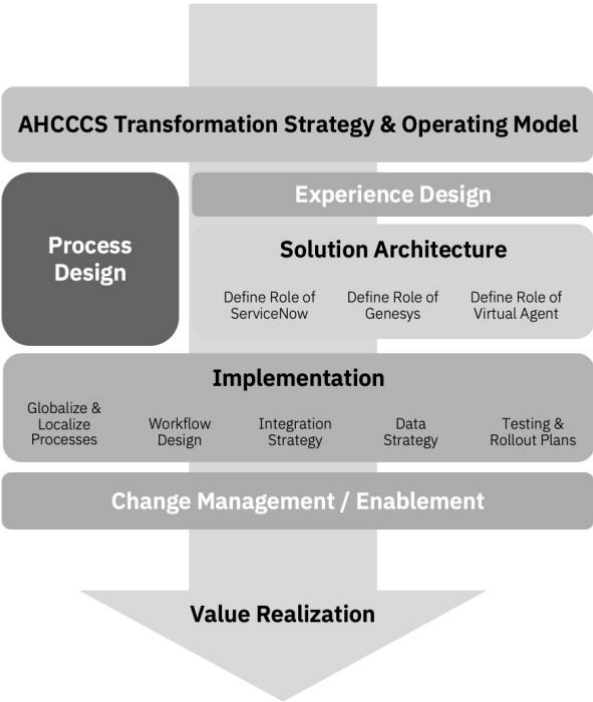
(Limit 10 pages) describing your technical approach to fulfilling the requirements outlined in the Global Requirements (Requirements Matrix).

Our Proposed Transformation Framework for Realizing Your Vision

Our delivery framework in conjunction with a methodical and sequenced approach will deliver the value envisioned through this program.

We will enable AHCCCS to achieve incremental outcomes throughout the transformation journey and capture the value of its investments, while at the same time creating enhanced experiences for its employees, supplier and customers

Implementation Overview

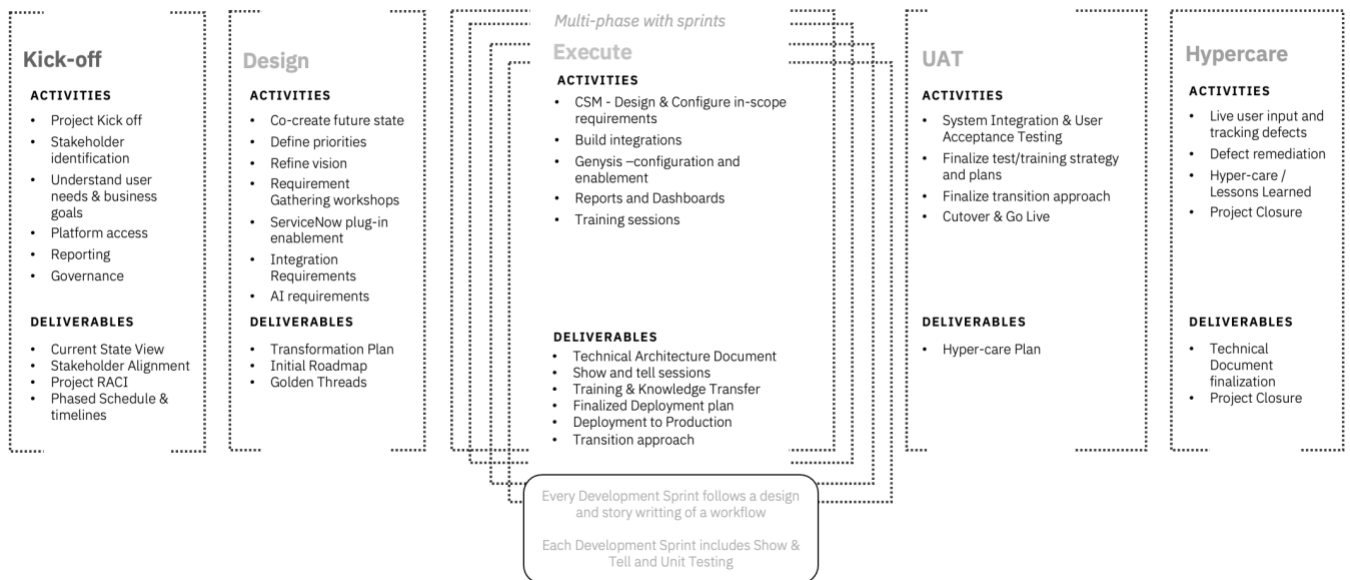


Approach Overview

IBM’s approach delivers an AI-enabled, omnichannel contact center built on **ServiceNow Customer Service Management (CSM)** and **Genesys Cloud AI Studio**, with the citizen experience at the center. The solution modernizes engagement across voice, digital, self-service, and the customer portal while reducing complexity and improving efficiency.

Genesys Cloud’s customer experience capabilities are tightly integrated with ServiceNow’s workflows, case management, knowledge, and data foundation, creating a single, connected environment. Citizens can submit requests, track cases, access self-service, and move across channels without repeating information, while agents have full visibility into context and interactions.

The approach emphasizes accessibility, security, scalability, and rapid configuration. AI, automation, and portal-driven self-service provide a flexible foundation that supports continuous improvement and future growth without disrupting the citizen experience.



Vision and Objectives

IBM's vision is to deliver a contact center that is easy for members, providers, and agents to use; is highly resilient; is governed by transparent processes and role-based access controls; and is powered by intelligent automation. The system reduces reliance on manual triage and repetitive human work, promotes digital self-service, and helps ensure that complex needs reach the right human expert quickly.

Key objectives:

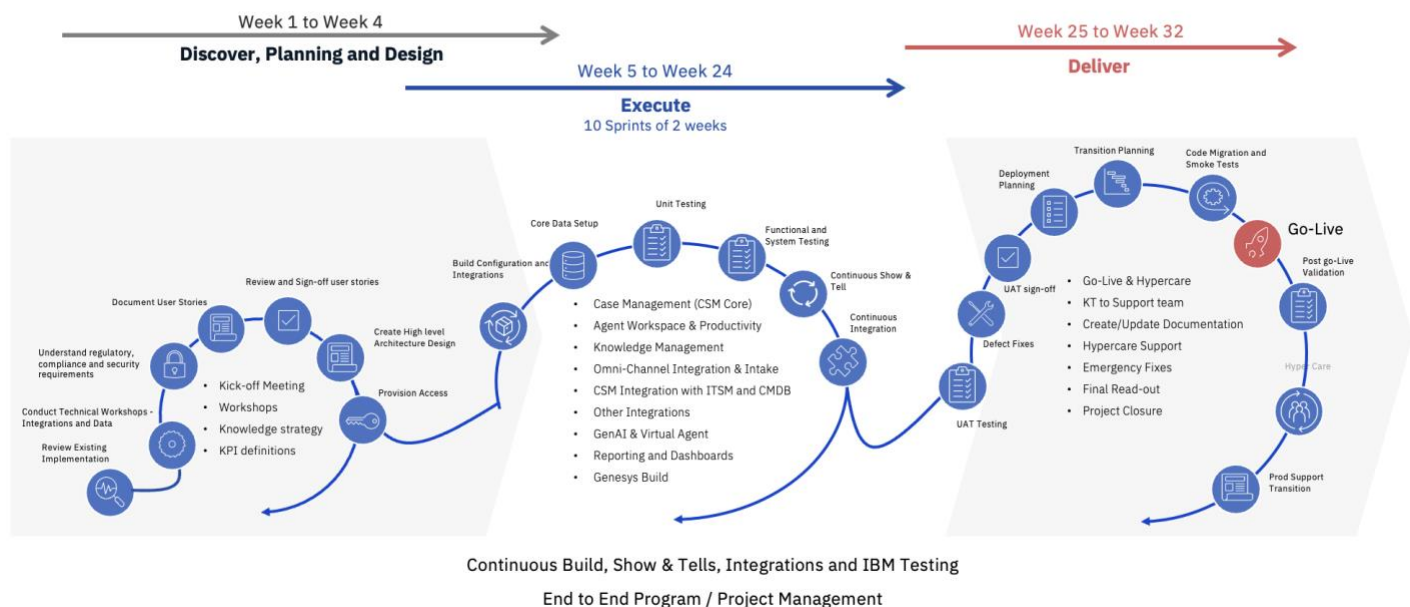
- Provide omnichannel access to services including voice, chat, messaging, email, portal, and walk-up.
- Deploy AI-driven virtual assistants for natural language interactions in both voice and text.
- Create a unified case management and knowledge environment backed by reproducible, rules-driven workflows.
- Enable skill-based and attribute-based routing across all channels.
- Improve first contact resolution, customer satisfaction, and operational efficiency.
- Deliver ADA and WCAG 2.1 AA-compliant experiences for both customers and agents.
- Offer transparent reporting, analytics, and performance dashboards across both platforms.
- Enable compliance with HIPAA, HITECH, NIST, FIPS, Section 508, and other regulatory frameworks.
- Provide reliability with high availability and disaster recovery aligned to mission-critical requirements.
- Establish continuous improvement processes to drive automation, knowledge expansion, and optimization.

IBM will leverage our experienced cross-skilled resources and expertise to build a “stronger together” ServiceNow + Genesys experience. IBM has the capability of integrating ServiceNow with Genesys either using the new Unified Experience, recently released by Genesys and ServiceNow, or using the traditional integration approach. Currently, Unified Experience is not available on Fedramp tenants, however, given that there will be some time before this Task Order is finalized, it may be released in time for AHCCCS to leverage.

Solution Overview

CSM Build and Implementation Approach

It will be a 32 weeks transformation that involves configuring and customizing the platform to meet an organization's specific business needs, integrating it with existing systems and processes.

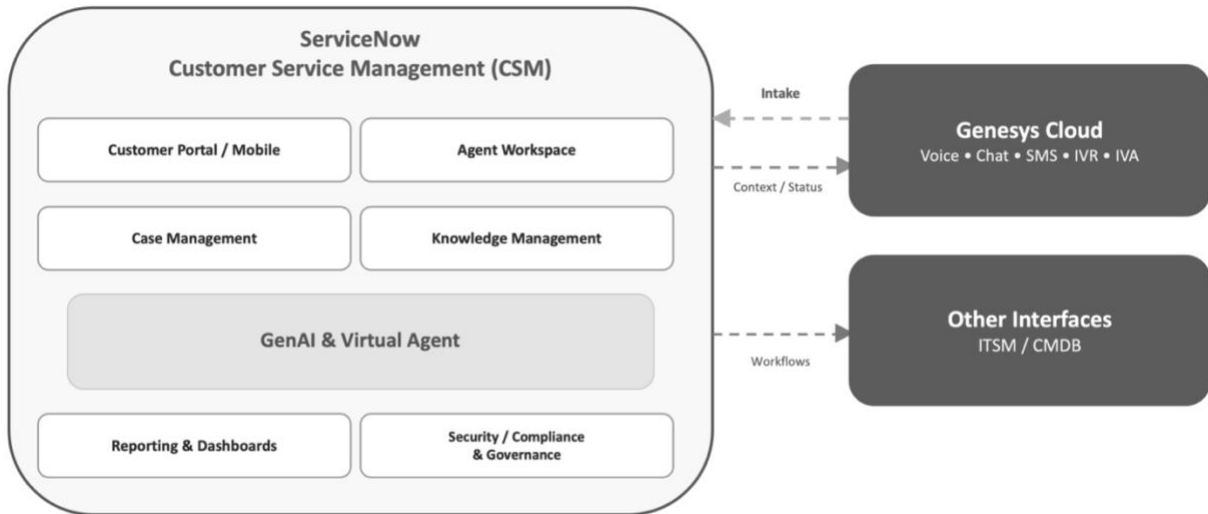


The proposed solution integrates Genesys Cloud for telephony, voice channels, voicebot capabilities, workforce engagement management, call recording, and speech analytics, with ServiceNow CSM as the authoritative system of record for cases, customer data, digital workflows, knowledge, and reporting. Together, the platforms create a coordinated front-door and back-office environment.

Genesys Cloud manages all inbound and outbound voice interactions and provides the AI-driven IVR and voicebot experience. It leverages natural language understanding, call steering, attribute gathering, and will integrate with ServiceNow for customer information, open work items, and to determine Next Best Action in each customer's context. ServiceNow supports the customer service operations lifecycle from intake through resolution, coordinating workflows across multiple interactions, departments and systems.

ServiceNow Integration Hub and purpose-built connectors enable bi-directional data flow between the platforms, including contact attributes, case details, interaction context, call history, transcripts, and routing metadata. As a result, agent experiences remain unified, and automation can operate across both systems without custom code.

Architecture Description



ServiceNow remains the system of record for cases, knowledge, workflows, and audit. Genesys provides omni-channel engagement and routing.

The architecture is modular and cloud-based, supporting horizontal and vertical scale. Its design includes:

- Genesys Cloud for voice, IVR, Voice Virtual Agents/Voicebots, call routing, call transcription, call recording, sentiment analysis, and callback management.
- ServiceNow CSM for case creation, customer data management, digital workflows, and omnichannel work queue assignment.
- Virtual Agent in ServiceNow for chat-based interactions, integrated with generative and conversational AI components as permitted by policy.
- IntegrationHub for API-based data exchange, authentication handoffs, CTI events, and synchronization of case and interaction data.
- Knowledge Management as a centralized, governed source of truth for policies, benefits information, troubleshooting guidance, and self-service content.
- Real-time and historical reporting via native capabilities in both systems.

Elastic scaling allows the environment to handle expected peak loads and unpredictable surges in call volume. High availability designs target 99.95% uptime. Active-active capabilities help ensure that disruptions fail over with minimal user impact. All components use configuration-driven development, minimizing custom code and ensuring maintainability.

Accessibility and Language Support

Accessibility is a foundational requirement. Both the agent workspace and customer-facing channels conform to ADA and WCAG 2.1 AA guidelines. Support includes screen reader compatibility, keyboard-only navigation, high-contrast modes, and accessible content templates.

For hearing-impaired customers, the system supports telecommunications relay services including 711 TTY/TDD gateways, and real-time text solutions. At AHCCCS's option, IBM will customize a toll-free number for 711 relay, allowing longer pause times to accommodate the delays inherent in TDD relays.

For limited English proficiency users, dynamic routing based on language preference directs calls or chats to bilingual agents or to multilingual virtual agents. Initial deployment includes English and Spanish; the architecture supports adding additional languages with predictable effort.

Agent Experience

Agents operate within ServiceNow Agent Workspace, a modern environment that consolidates case information, interaction history, customer records, knowledge articles, workflows, and supporting signals. The interface presents a 360-degree view of the customer along with SLA timers, alerts, and decision support tools. Real-time recommendations are provided through Agent Assist, which surfaces scripts, knowledge articles, and next steps based on conversational cues or case metadata. IBM will modify Genesys Architect flows to hand off self-service / IVR interactions to ServiceNow, providing initial context for agents.

Agents receive guided workflows via Playbooks and decision trees that provide prescriptive support for complex processes. Knowledge articles, similar case suggestions, and policy guidance appear automatically based on context. Agents may temporarily delegate interactions to virtual agents and reclaim them when appropriate. Wrap-up codes, post-call notes, and customer sentiment indicators transfer directly into the case record.

Customer Management, Routing, and Queueing

Identity verification workflows support multiple authentication patterns including knowledge-based questions, multifactor authentication, call risk scoring, and identity matching rules. The system logs all verification attempts for audit purposes.

Routing leverages a combination of Genesys and ServiceNow capabilities using skills, capacity models, agent availability, attributes such as language or program type, and affinity factors based on historical relationships. Genesys will be responsible for selection of agents to answer a call, retrieving case data from ServiceNow, while ServiceNow will provide long-term case management from initiation to closeout and audit. Cases and interactions are automatically categorized, prioritized, and queued. Supervisors may manually rebalance queues in real time. Escalation rules trigger based on SLA thresholds, risk indicators, or policy requirements.

Intelligent Automation, Bots, and NLP

AI-driven automation reduces agent load and improves speed to resolution. Virtual Agent in ServiceNow supports text-based chat and structured workflows. Genesys voicebots handle speech-based interactions, call steering, and information gathering. Both platforms use natural language understanding to interpret intent, capture entities such as names, dates, or identifiers, and route interactions accordingly.

Customer handoff from bots to humans includes full context, prior questions, collected data, and conversation transcripts. Agent Assist empowers human agents with real-time suggestions, knowledge lookups, and automatically generated summaries. AI elements operate within a human-in-the-loop governance model with transparency, auditability, and version control.

Omnichannel Engagement and Continuity

The solution supports voice, chat, SMS, email, secure messaging, social channels, web portal interactions, and walk-up/welcome center engagements. Interaction context persists across channels. A client may begin in chat, switch to a phone call, and resume via secure messaging without repeating information.

Callback functionality includes both ASAP and scheduled callbacks with estimated wait times. Unified transcripts and interaction histories help ensure every channel contributes to the citizen's full engagement profile. Callbacks can be triggered as a caller enters a queue in Genesys, can be offered in a widget on a website, or can be scheduled by an agent or ServiceNow workflow, depending on the use cases IBM and AHCCCS agree on.

Self-Service and Knowledge

Genesys offers three tiers of self-service bots: Deterministic voicebots, Generative AI based Virtual Agents, and Agentic Agents with guardrails developed in AI Studio. IBM will work with AHCCCS to select the right one for each of the targeted use cases, balancing the need for consistent, predictable responses, flexibility in responding to citizens' needs, and consumption costs.

For Digital Self-Service, a branded self-service portal built on ServiceNow provides personalized access to knowledge articles, case status, chat, virtual agents, appointment scheduling, community forums, and request forms. Knowledge management includes lifecycle processes, approvals, feedback loops, and automated article retirement or updates. The system supports AI-enabled search that prioritizes the most relevant content.

ServiceNow's Engagement Messenger extends these capabilities into external websites and mobile applications via lightweight code that embeds chat, virtual agent, and knowledge capabilities.

Reporting, Analytics, and Monitoring

The contact center provides a single view of operational performance through real-time dashboards, historical reports, and predictive analytics. Genesys Cloud dashboards measure call handling, queue performance, agent activity, interaction flows, and bot containment. ServiceNow dashboards focus on case volume, SLA performance, resolution trends, and knowledge usage.

Trend detection highlights recurring issues such as system outages, policy confusion, or seasonal spikes. Surveys including CSAT, NPS, and agent feedback help shape continuous improvement efforts. AI-assisted analytics identify emerging topics and opportunities for automation or knowledge enhancements.

Security, Privacy, and Compliance

Security is built into every layer. Authentication integrates with enterprise SSO using SAML or OIDC. Multifactor authentication, role-based access controls, field-level encryption, end-to-end TLS 1.2 or higher, and secure audit logging protect user data. The platforms support HIPAA requirements including minimum-necessary access, encryption at rest and in transit, audit readiness, and business associate obligations.

The environment follows NIST controls, FIPS-validated modules, OWASP application security guidelines, and Section 508 accessibility standards. Log retention policies, SIEM integration, and intrusion detection enhance oversight. All AI and automated decisions follow human governance and auditability frameworks.

Implementation Approach

IBM employs a structured approach combining user-centric, Agile delivery with traditional program governance. Key components include:

- Detailed discovery and requirements validation
- Architecture, and Voice/Digital Bot Design
- Platform configuration (and integration with Genesys) using out-of-the-box capabilities
- Iterative sprint cycles with user feedback and Bot tuning
- Data migration planning and execution
- Integration testing and user acceptance testing
- Training for agents, supervisors, delivered through a train-the-trainer approach
- Go-Live Preparation, Deployment, Go/No-Go, and cutover
- Hypercare and Transition to long-term Support

Assumptions and Dependencies

Our proposed solution is predicated on specific assumptions and dependencies influencing overall effort and implementation. We look forward to engaging with AHCCCS to validate these assumptions and make any necessary adjustments to the solution as required to further align with agency expectations.

Based on our experience working across comparable agencies and use cases, we have applied the following assumptions to shape our timeline and effort estimation:

- Customization is anticipated to be required for <10% of requirements with out of the box configuration representing the vast majority of the solution. This aligns to industry best practice and our detailed analysis of AHCCCS requirements.
- Workflows: The solution includes support for up to ten case/request types (comprising five simple, three medium, and two complex workflows). In our experience, we see logical patterns with Medicaid use cases that allow us to group workflows accordingly.
- Integrations: Up to five third-party integrations are assumed with the vast majority of requirements being handled within the Genesys and ServiceNow platforms and via integration of the core solution elements.
- Dashboards & Reports: Configuration will include up to three dashboards and ten reports that provides AHCCCS users with the right information visibility and insights for intelligent decision making and governance.

We also have identified key dependencies on AHCCCS that support an efficient solution design and implementation. This includes the following AHCCCS responsibilities:

- Securing the availability of key business and technical stakeholders for workshops, sprint reviews, backlog refinement, user acceptance testing (UAT), and approval processes throughout the duration of the project.

- Ownership of organizational change management activities informed by IBM including via the service blueprint and training plans designed to support effective enablement and adoption.
- Performing UAT (IBM supported) and providing requisite approvals.
- Managing compliance with all relevant software licensing obligations including maintaining product licensing and support agreements for overall Genesys and ServiceNow products.

B4 Completed Requirements Matrix

Please see the completed **AHCCCS Call Center AI Integration IBM Requirements Matrix** as included in IBM's Task Order response.

NOTE: The template provided by AHCCCS does not allow textual responses in the Contractor Response Notes column of the SLA tab. We therefore have not added specific comments to individual SLA lines. The solution IBM has designed can be compliant with the SLAs described above, but dependent on ServiceNow and Genesys (which AHCCCS has independently procured) also meeting these SLAs.

B5 Pricing Proposal

Please see the Please see the completed **AHCCCS Call Center Pricing Proposal_IBM** as included in IBM's Task Order response.

PART C

C1 Separate, signed, Legal Analysis for Confidential /Proprietary Determination (if any)

N/A

C2 Exceptions to any part of task order

IBM's solution meets requirements across all categories and requirements as further detailed in the attached Requirements Response Matrix. However, in certain cases, the solution is dependent on core Genesys and ServiceNow product capabilities or existing agreements between these platform partners and AHCCCS. In our Requirements Response Matrix, we have flagged those areas that are already covered through the Genesys / ServiceNow platform or existing agreement structures.

Upon the State's award of this work to IBM the parties will negotiate and sign a Statement of Work (SOW) which will describe the scope of work, our respective responsibilities, charges, and other terms. The mutually signed SOW will be the final description of IBM Services and will supersede IBM's RFP bid response in the order of precedence.