**Question: Please provide the following information regarding your Company/Corporation:?**

KPMG’s process taxonomies reference models and process design are accelerated through the ARIS’ enterprise modelling tool, offering the following benefits:

* Relational based modelling for integrated and holistic modelling of the design layers: people, process, technology, governance, data, and service delivery.
* Offers a single source of truth, acting as a single repository for process models, avoiding version conflicts or lost updates.
* Instantaneous reporting provides complete transparency across process models, ensuring compliance with defined standards and increasing the quality of produced process models.

**Question: Brief history of your company.?**

The KPMG network was formed in 1987 when Peat Marwick International and Klynveld Main Goerdeler merged with their respective member firms, with the history of KPMG dating back to 1895.  
  
Member firms' clients include business corporations, governments and public sector agencies and not-for-profit organisations. They look to KPMG for a consistent standard of service based on high order professional capabilities, industry insight and local knowledge.  
  
Sustaining and enhancing the quality of this professional workforce is KPMG's primary objective. Wherever we operate we want our firms to be no less than the professional employers of choice.  
  
We contribute to the effective functioning of international capital markets. We support reforms that strengthen the markets' credibility and their social responsibility. We believe that similar reform must extend to the professional realm.  
  
Globally, KPMG operates in 153 countries and territories and has close to 227,000 people working in member firms around the world. In Australia, KPMG has more than 9,000 professionals working across 14 offices nationally.  
  
Innovation is no longer a buzzword. More than ever, it is a critical element in fuelling business growth, driving productivity and maintaining market share. To ensure we can assist our clients in driving innovation, we formed the KPMG Innovation Factory to help your employees and stakeholders’ harness and implement new ideas that drive growth.  
KPMG Innovation Factory supports you to:  
● transparently address key business opportunities and challenges  
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We also have a dedicated solutions team with a passion for reimagining industries. That team works with our industry experts to solve the trickiest issues out there, creating strategies to implement innovation and turning ideas into meaningful outcomes for our clients.  
Developed by the best and brightest minds at KPMG, our catalogue of over 60 innovative digital solutions combine the best aspects of our people, processes and technology to provide insights to drive confident decision making, tailored to your business needs.  
  
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Clinical System Redesign: KPMG's Care System Redesign (CSR) global proposition focuses on how models of care are designed, paid for and provided across a defined geographical area. The core purpose of this proposition is to help our clients transform health and care systems to achieve a triple aim; improved health outcomes for a local population, improved quality of care and lower costs.  
  
Data Analytics: When it comes to saving lives, every insight counts, so KPMG reached out to its international network to dive into the data and find the most innovative, effective and sustainable solutions to help Ambulance Victoria be on the front foot.  
  
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Supply Chain Predictor: From global pandemics to geopolitical turmoil, leaders in logistics, procurement and operations are facing increasing difficulty with safeguarding their organisations against supply chain vulnerabilities. KPMG Supply Chain Predictor provides you with end-to-end, real time oversight of your entire supply chain, while utilising predictive analytics and artificial intelligence to identify potential disruptions before they occur. By combining internal and external data points, our AI-enabled modelling engine greatly reduces risk by helping you proactively respond to supply and demand variability.  
  
Innovation to help Blind Citizens Australia make a difference: Blind Citizens Australia (BCA), a not-for-profit organization serving a nationwide community of about 450,000 people, has propelled its customer relationship management into the digital age with a unique CRM system that makes member data accessible to its entire staff – most of whom are blind or vision impaired. In taking on this unusual transformation journey, BCA worked with KPMG Australia to develop a digital database that now allows BCA’s team to manage and accelerate tasks such as member communications, resource and information updates, membership requests and more. The CRM solution replacing paper-based data sharing also provides database access via mobile devices for the many BCA employees who work remotely and rely on mobile devices equipped with assistive technology such as voiceover.

**Question: Are there any changes anticipated in the company’s ownership and/or its structure??**

As global firm KPMG is the subject of proceedings, actual or threatened, from time to time. We have well established local and global procedures in place to manage such proceedings, and appropriate insurance cover. To the best of our knowledge there are no proceedings or investigations against KPMG at this time that would impact our engagement.

**Question: Describe the overall long-term strategic focus for your company.?**

The leadership team are responsible for the overall day-to-day delivery and management of the project, providing support, tracking progress and compliance adherence as appropriate. The roles are outlined below:

|  |  |
| --- | --- |
| Role | Main Responsibilities |
| Project Manager ([Client]) | * Accountable to the Project Sponsors. * Manages the strategic aspects of the Project. * Reviews regular progress reports and makes staffing, financial, or other adjustments to align the developing project with broader outcome goals. * Leads and oversees the [Client] team of the Project. * Participates in Steering Committee meetings and decisions. * Responsible for the end-to-end establishment, management, and delivery of the project. * Liaise and drive involvement of Key Stakeholders with a strong focus on business benefits and objectives of the project and implementation. |
| Delivery Lead (KPMG) | * Provide a single point of accountability from KPMG to deliver the project per the project commitments. * Establish the project resource assignments and confirm that the project is appropriately managed and staffed by working with the [Client]’s Project Manager. * Collaborate and support [Client]’s Project Manager in managing the overall project. * Communicate important decisions and objectives impacting the deliverables of the project down to the team members. * Initiate the recommendations and decisions from the steering committee. * Provide leadership to the delivery team, lead and oversee KPMG team members. * Confirm that project and risks and issues are identified and mitigated and raised through project governance as appropriate. * Conduct quality reviews of deliverables across the project and confirm agreed quality reviews and quality assurance procedures. |
| PMO/Support ([Client]) | * Organise, schedule, and facilitate project governance activities supporting Project Leadership. * Maintain the Project Gantt chart, prepare Progress Reports, maintain a register for Issues and Risks and manage project budget. * Support Project logistics and organise stakeholder events. * Monitor project deliverables progress and appropriate processes, signoffs, and approvals. |
| Workday Delivery Assurance Manager (Workday) | * Drive Workday Methodology Adherence. * Provide a Workday viewpoint to the customer and project team. * Act as an escalation point for the Delivery Assurance consultants and project team. * Perform Workday Delivery Assurance project checkpoints. Perform project reviews. * Participate in the Internal Team and Customer meetings for applicable checkpoints. * Review the customer’s plan for operational readiness for production. * Conduct regular calls with KPMG’s Engagement Delivery Lead and [Client]’s Project Manager. |

**Question: Describe the long-term strategic focus for your insurance division.?**

Thank you for the opportunity to submit KPMG’s Workday implementation services proposal to your Request for Proposal - Human Capital Management (HCM) Solution. The opportunity to meet your panel evaluation team in person as part of the SI Workshop held on 5th July 2021, has further given us the appreciation on the importance of this project for [Client] to drive the digitisation of the HR function, increase operational resilience across your processes, systems and data as well as uplift the employee experience through a significantly improved and intuitive user interface.

We are committed to working with you to implement a modern and leading Workday HCM platform and to continually evolve and improve the solution with you as part of our Workday Application Managed Services (AMS) service.

At KPMG, we understand the complexity of HCM implementations on Healthcare organisations with a diverse and geographically dispersed workforce. We know this initiative is a significant undertaking to standardise and digitise HCM processes, improve worker experience, and re-boot the HCM fundamentals and drive resilience in your operating model and business processes. As a leading Workday implementation partner for the Healthcare sector globally, we are confident that we lead you through these implementation complexities, de-risk the program and deliver sustainable change.

As a partner, we are proud to present our team who are deeply credentialised in Workday, trusted by our clients and will work shoulder-to-shoulder with Healthscope to transform the HCM function and business processes.

**Question: What percentage of your company’s revenues were generated from integrated BPO/ITO services for Insurance companies??**

Over the years, Healthscope has varied in account size but is typically in our top 20-30 clients when compared to other healthcare clients.

**Question: What percentage of your company’s revenues were generated from integrated BPO/ITO services for Life and Annuities??**

Over the years, Healthscope has varied in account size but is typically in our top 20-30 clients when compared to other healthcare clients.

**Question: Provide three references including contact names and phone numbers.?**

Management of reported solution-level incidents from initial triage, diagnosis and classification to resolution as quickly as possible and minimise the adverse impact on business operations, thus ensuring that the best possible levels of service quality and availability are maintained within agreed service levels and business priorities.

| Bronze Plan | Silver Plan | Gold Plan | Platinum Plan |
| --- | --- | --- | --- |
| On-Demand | On-Demand | Included | Included |

**Question: Please describe your capabilities in the following areas inclusive of:?**

KPMG’s process taxonomies reference models and process design are accelerated through the ARIS’ enterprise modelling tool, offering the following benefits:

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* Offers a single source of truth, acting as a single repository for process models, avoiding version conflicts or lost updates.
* Instantaneous reporting provides complete transparency across process models, ensuring compliance with defined standards and increasing the quality of produced process models.

**Question: Please describe how you could support our organization with regards to implementation and ongoing support. Please also give consideration to where an outsource model might support other corporate functions e.g. finance transaction processing?**

KPMG recognises that unexpected events occur over the course of a long-term delivery engagement and maintains a pool of both staff and pre-qualified contingent resources that we have at our disposal. In the event of a planned event (e.g. annual leave), the PM responsible for the successful delivery of the engagement will work with the staff member and their key clients to confirm the work that will need to be completed during that period and ensure that an agreed plan is established for how the individual's leave will be covered. Our collegial culture means that typically what happens is that other team members come together to support the work that needs to be done while the individual is on leave - we believe that such an approach is beneficial as it allows us to cross-pollinate skills between team members, ensuring that for any given activity there is a level of redundancy in our staff profile. If, however, there is a need to manage an extended period of leave, the PM will work with our internal resourcing team to locate an appropriate replacement for the individual that we will also then agree with Healthscope. Any onboarding of this resources will be a KPMG responsibility to ensure that knowledge of the project is provided to this individual to enable them to be a productive team member as they come onboard.  
  
In the event of non-performance, our experience is that this is not usually a sudden realisation but a gradual process that we would work through with Healthscope. In the event that we both agree that the individual is not suitable for their role, then we would once again work with our internal resourcing team to identify alternative candidates and we would then agree a transition plan with Healthscope. Once again, the responsibility for onboarding the replacement would be KPMG's responsibility and we would seek to ensure that knowledge of the project and their role is provided to them prior to the official commencement on the project.

**Question: Please describe use of the following technology in your current offering, and how Resolution Life US realizes benefits from same.?**

Our KPMG’s Powered Enterprise | Integration is a detailed transformation framework designed to help organisations overcome the complexities of cloud adoption and unlock data out of legacy applications.

We help these organisations accelerate the pace of delivering innovation by allowing them to connect front-, middle- and back-office to effectively deliver on ever-increasing customer & user expectations, address operational inefficiencies, and harness the learnings from failing fast and small.

With our framework, we work with organisations in the region to:

* Quickly and efficiently build an appropriate long-term API strategy from inception to execution leveraging leading Integration Platform like MuleSoft.
* Unlock data from legacy systems quickly with our pre-built library of assets for Higher Education.
* Quickly move to the cloud with our Pre-configured processes for leading cloud solutions (e.g. Workday, ServiceNow, Microsoft, Coupa and SAP).
* Change the clock speed by adopting future proof DevOps processes and tools built for Mule 4

**Question: In your current offering do you make use of any strategies for migrating existing information and processes??**

|  |  |
| --- | --- |
| Services | Description |
| Base Services | The Base Services will be fulfilled by applying the standard processes used within the KPMG Powered Evolution Service Desk. |
|  | Incident Management  The KPMG Service Desk will be the single point of contact to manage Level 3 incidents or defect tickets. |
| Workday Bi-annual Update Assessment - Functional Update Support  Provide [Client] with a report detailing the impact on your environment, opportunities for Workday major release management (Bi-annual updates): |
| Enrichment Services | Enrichment Services allow clients to fulfil a changing demand through service catalogue items or change requests. KPMG is engaged via a Service Request mechanism. |
|  | Enhancements  An enhancement is a requested addition to documented functionality or a request to change the existing functionality of the Workday solution. KPMG will package each change for release, handing it over to the Client for final integration and UAT, and then planning and migration to production. These may include configuration changes, report writing, integration services, data load services, training, documentation etc. |
| Tenant Management  Management of [Client]‘s Workday tenants is done via a service request to support on-going development, configuration changes, minor Workday updates, and regular functional updates. |
| Workday Bi-annual Update Deployment – Test and Deployment  Configure the enhancements and new features within the test and sandbox environments. Test the new functionality against the existing configuration in a sandbox environment. Deploy the new configuration into the production environment. |
| Problem Management  A problem is a recurring incident or request by which resolving a root cause will resolve a new instance of the incident or request.  As Problem investigation can be time-consuming and, in most instances, leads to a request to resolve an underlying issue, we require [Client] approval before engaging in the investigation process. |
| Governance Services | The Governance services oversee the delivery of services that meet the service level appropriate for Client needs and as detailed in the service contract. The effort is reviewed and adjusted every quarter depending on [Client] needs and other services provided. |
|  | Change Management  Management of any changes required to maintain the service alongside release planning, testing, packaging, and scheduling. Provision of input into the Client Change Management process (Client will provide a dedicated development environment for KPMG to provide their services to the Client, any development work will be packaged and handed over to the Client to deploy into production). |
|  | Strategy and Roadmap Planning  Functional update planning services provide a forward-looking plan outlining your roadmap for future adoption and maturity improvement. The plan will be the basis for establishing an updated schedule. |
|  | Reporting  Provide critical oversight and account management to help ensure that the right policies, procedures, and processes are compiled, and accurate financial and management reports are produced. KPMG CSM will conduct a monthly Service Review with the Client. The Service Review reporting pack will cover performance against agreed SLA targets with red-amber-green status and cover significant cases and Service Requests. It will also cover changes that were delivered to the Client for the period and arose from cases, regression testing and Service Requests. |

**Question: Who are your current preferred technology providers in these areas if applicable??**

* Review the current operating model before the implementation and align it to the [Client] business strategy.
* We would confirm that the HR business processes align with the HR operating model and work with [Client] to understand decisions made on business processes.

**Question: Please include any future use with these technologies in your current offerings that we could expect to see in the next 12-18 months.?**

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**Question: Please describe your current operating model that you would propose for Resolution Life US.?**

Below is a breakdown of KPMG’s Target Operating Model (TOM).

**Question: How much is onshore / nearshore / offshore and how do you decide the mix?**

KPMG recommends that Healthscope should start working on the following activities and review their current state as part of their preparation work.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Business** | | **Program Management** | | **ITS** | | **Change Management & Training** |
| * Review of job catalogue. * Organisation Structure. * Variations of workforce (corporate, casuals, professional, contingent). * Think about committees and unions. * Data preparation. * Rewards and performance framework. * HR Policies revision. * EBA’s. * Vendor Alignment and expectations. * Compensation Framework. * Reporting KPIs preparation. | | * Identify key roles and commence preparing resourcing. * Set up a program structure and team. * Confirm program and executive sponsors. * Define program objectives and vision. * Set up a Project Management Office and identify the required Project Management tools. | | * Plan Work breakdown, activities & resourcing for legacy applications. * DevOps strategy. * Infrastructure and Environment capacity planning. * Provide existing development guidelines. * Provide security guidelines. * Vendor Alignment and expectations. | | * Document known business blackout periods and other change initiatives timelines. * Identify and engage key stakeholders. * Identify and engage change champions. | |

**Question: When do you migrate to a target system??**

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**Question: Please give examples of your current standard operating guides and service standards?**

A single point of contact for a customer who is responsible for managing the agreed application Managed Service.

| Bronze Plan | Silver Plan | Gold Plan | Platinum Plan |
| --- | --- | --- | --- |
| 15 hours per month | 22.5 hours per month | 40 hours per month | Custom |

**Question: Please give examples of your current standard policy forms and documentation letter types?**

Outbound EIBs would extract information from the Workday system, and either attach it back to the [Client] tenant for future use or reference or send it somewhere for further processing. Currently, over 75% of outbound EIBs currently in the Workday production environment globally send a file to an external destination via sftp.

**Question: Please give details of your current UX/CX and portal approach?**

Steady-State services refer to the ongoing delivery and optimisation of the Service. The Steady State services occur after the completion of the Transition State, which involve Planning, Executing and Operating.

**Question: Please give online adoption rates by product type and territory?**

Over the years, Healthscope has varied in account size but is typically in our top 20-30 clients when compared to other healthcare clients.

**Question: Please give details about your transformation success, particularly around FTE efficiencies, one and done rates, adoption, UX/CX?**

|  |  |
| --- | --- |
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**Question: Please describe how IP developed by Resolution Life US (e.g. machine learning) could be implemented in conjunction with the Finance Systems.?**

Through our ThinkPay offering, KPMG has been working with clients across different industries, including Healthcare, bringing a multi-disciplinary approach, industry better practices and insights in addressing payroll matters.

Utilising our proven payroll vulnerability framework and data analytics tools and methodology, we can evaluate the maturity of your risk mitigation strategies, quantify the gaps and provide targeted and pragmatic recommendations to address identified gaps in your payroll compliance and this can be performed as part of your HCM design and planning phase.

**Question: Please describe the approach to charging and give specifics based on the supplied data?**

[Client] can engage KPMG via the KPMG Service Desk, which is done via email, Portal Self-Service, or ideally automated routing of tickets from your Service Management Tool to our ServiceNow instance. Tickets are triaged and classified as Service Requests or Incidents. Incidents are responded to by our team with Service Requests classified and prioritised in agreement with [Client].

**Question: Please describe your proposed compliance approach.?**

* During design, we may encounter business rules that are unique and which may not be a solid fit for how Workday is typically used to meet similar needs. First, we would try to understand what needs to be done and why it needs to be done. Is it legally mandated? Is it required to feed a downstream system? Does an internal group strongly desire it? Or, is it needed because that’s how it’s always been done?
* We would challenge requirements that may not be based on what needs to be done but are often grounded in experience in how things are done. We would bring our point of view in simplifying your implementation, leveraging our expertise with leading practice business process configuration.
* When we encounter legitimate requirements or rules that are a challenge to implement, we would thoughtfully perform a gap analysis, identifying the required options, pros and cons of each option, and facilitating a discussion with business representation to determine the appropriate strategy to address the gap. This may involve changing the requirement, getting creative with Workday, or creating process components that reside outside of Workday.
* In any case, we would thoroughly document the end-to-end process leveraging existing processes as a starting point, and the confirmed test scenarios are appropriately represented. We would monitor proposed solutions through testing and through Workday updates to help [Client] be sure that the solution being deployed maintains the best balance between the requirement and keeping the solution manageable and straightforward.
* We would bring forward a strong point of view on the Workday data model and enforce this through our data conversion activities. We would not seek to take what you have and migrate it. Instead, we would work with you to define the “to be” and map current organisational data to that model.
* The model would reflect our leading practices for structuring organisational hierarchies in Workday, given our understanding of how your organisation functions related to reporting relationships, decision making, approvals, and security.
* The model would be iterative, working with required HR resources from [Client] to ensure consistency and accurate understanding of the design elements within the data model.
* Facilities for employees to access system with appropriate security/ privacy – either through applicable mobile phone policies, terminals, or kiosks.

**Question: Please describe your approach to risk?**

We offer the following core competencies as an underlying foundation to support your Steady-State of the Workday solution in line with your overall HR business plan:

* Process and Performance Improvement and Innovation – this core competency reflects our ability to optimise and unify business and individualised processes, information, and technologies into systems that provide improved business and individual performance. This core competency leads to enterprise-wide performance improvement.
* Managing Complexity – this competency reflects our ability to integrate and apply diverse resources in directing disparate projects or relationships of any scale through standard methodologies, shared experiences, and business practices.
* Industry Insight – this competency gives industry specific meaning to our collective core competencies as they create an advantage for our clients in their respective industries. Our collective experiences and insights generate benefits for our Clients.
* Relationship Management – this competency is represented in our people's business philosophies, approaches, skills, professionalism, and character attributes. This skill enables us to form a broad range of relationships on which we continuously create credibility, trust, and respect.

**Question: Please provide any assumptions you have made in preparing your response to the RFP questions.?**

* The job catalogue is a core requirement for the HCM design as it drives the HR business process and approvals.
* Design the job catalogue before the HCM implementation begins to align with the HR business needs and requirements.
* We will review and challenge the job catalogue to confirm that it will meet the business needs and operating model.
* Data cleansing activities play a significant role in successful data conversion and should be completed as planned. Start the data cleansing process as early as possible, and if possible, in the related source applications to reduce cleansing and manipulation efforts later.
* Include the Data Migration team in design workshops, as decisions made during these sessions will significantly impact data. Implement a repeatable data conversion process: extract, cleanse, and load.
* Data security is critical, and all elements should be considered and adhered to, including requirements for an sFTP server and secure data storage.
* We work with your data conversion team early and often to accelerate data conversion activities. After each prototype, we would conduct a lessons learned session to address issues we have seen, avoid repeating the same issues and improve the process right up to cutover.
* In addition, fact-based reporting on status and issues should avoid surprises, which would allow us to avoid impacting the timeline.
* The project can be staffed with an appropriate number of skilled resources from the consulting partner side. However, some organisations struggle with putting the correct number of suitably qualified and knowledgeable people from both business and technology areas onto the project. Projects that only places internal people on the project on a part-time basis while expecting them to also “do their day jobs” on a full time basis can encounter many difficulties. This risk requires a multi-faceted mitigation approach:
* Strong executive sponsorship that supports high-level participation from all stakeholders, including critical positions being staffed full time.
* We are backfilling critical positions, thereby freeing project team members from their “day jobs”.
* Consistent core team involved in the selection, planning, and implementation phases.
* Frequent and fact-based dialogues of change requests, managed through our change control process, would enable [Client] to understand and evaluate any proposed change before it is made. This focus on managing scope lets the team focus on performing the work needed to achieve the results. We would not let changes to the scope occur without having the proper dialogues of options, priorities, and impacts and bringing those recommendations to the appropriate governing body in managing the scope.
* In our up-front scope assessment, thorough attention to detail by our seasoned solution architects to limit, if not eliminate, the need to re-address scope considerations during the project.
* Provide open and transparent communication to the relevant Governance forums.
* Escalate as required to provide the appropriate information to the Senior Executives to review and reprioritise their Portfolio initiatives to reduce impacts on critical activities if needed.
* Plan the detailed transition activities and make provisions for remediation activities. We would agree up-front on the escalation procedures and milestones that need to be managed during the transition, e.g. Go-Live dates, and commencement of knowledge transfer.
* Escalate issues and risks immediately and take corrective action.
* The Workday Delivery Assurance review checklist should be followed during each phase – design, build and test, to avoid rework later.
* It is essential to make a comprehensive change approach, which goes well beyond communications and engages all impacted stakeholders. Early engagement is key as it allows the early discovery of resistance. This gives the project team more time to address concerns raised and gives the stakeholders more time to go through the ‘change curve’. The level of engagement required to mitigate this risk vary per stakeholder. Still, critical interventions include involving senior stakeholders up-front to help define the case for change, ensuring their point of view is considered, and having those most impacted engaged in the design can often help them feel more accountable and “own” the change.

**Question: Submit Questions up to noon (Central time)?**

Configure the enhancements and new features within the test and sandbox environments. Test the new functionality against the existing configuration in a sandbox environment. Deploy the new configuration into the production environment.

While a standard inclusion is provided, this can be varied per plan, e.g. a Bronze plan with 60 hours of update deployment

| Bronze Plan | Silver Plan | Gold Plan | Platinum Plan |
| --- | --- | --- | --- |
| On-Demand | 40 hours per release (2 per year) | 40 hours (2 per year) | Custom |