

IMLCC System Review

Objective: The IMLCC will engage in a review of the workflow and technology infrastructure currently used by and what has most recently been proposed for the IMLCC with outcome being to provide a current state assessment and recommendations and/or options for ongoing maintenance and future improvements. The review will focus on the following elements of the IMLCC environment:

- Website
- Applicant experience/workflow
- Operational/SMB workflow and data exchange
- Back office systems including reporting, payment and financial system
- Plans for upgrades and enhancements

The project will consist of a data gathering phase (2-3 days) and then an evaluation phase (timing TBD). The consultant will deliver a recommendations document that encompasses the different components of the IMLCC system. It is expected that recommendations for the different components may include both short-term and long-term options. The recommendations will be intended for use as a discussion document and will not include a pricing proposal for the recommendations.

Cost: The IMLCC will utilize an outside consultant (Kevin Hagen) to conduct the evaluation phase of the project and to participate in the recommendations phase of the project. A flat rate of \$2,500 will be billed to the IMLCC for Mr. Hagen's time. Mr. Hagen is a former FSMB employee and is knowledgeable in licensing work flow as well as the back office components.

Required Evaluation Materials:

1. Ability to experience the post-payment application completion user experience.
 - a. Is there a non-production environment that might accommodate a demonstration of the end-to-end user experience of application completion?
2. Provide access to DocuSign accounts and ability to inspect applicable templates as well as completed and in-progress documents.
 - a. Include any internal documentation regarding the configuration of the applicable templates.
3. Provide access to the administrative panels for the WordPress site (imlcc.org) and information regarding any applicable plug-ins (3rd party or custom).
 - a. Include ability to Query any applicable databases
4. Provide operational/systems insight regarding
 - a. How each submitted application is managed by IMLCC
 - b. How each SPL receives a completed application from IMLCC

- c. How each SPL verifies an applicant's qualifications
 - i. fingerprint/criminal check insight not needed at this time
 - d. How each SPL manages the Letter of Qualification download site
 - e. How the Letters of Qualification are managed
 - i. details regardless of inside or outside of DocuSign
 - f. The accounting management of
 - i. initial application funds (imlcc.org/applynow -- stripe)
 - ii. additional member state selections (DocuSign)
 - iii. renewals (imlcc.org/renew -- swipe)
 - g. How each SPL or Member Board facilitates and/or manages the fulfilment of status inquiries
5. Provide any feedback or insights regarding pain-points that may have been received
- a. Customers
 - b. Potential customers
 - c. Boards
6. Access to a resource that may provide timely answers to questions or additional access as deemed relevant to fully comprehending the existing system implementation.
7. Review plans for future upgrades, enhancements and application development if available.
8. Miscellaneous questions may arise during the evaluation resulting in additional documentation requests.