Example work:
Global Benefit Enrollment Platform
@ Willis Towers Watson

The History

Liazon founded a benefits enrollment platform called "Bright Choices"

In 2013 Liazon was purchased by Willis Towers Watson

In 2015, leadership decided to offer "Bright Choices" to their global clients
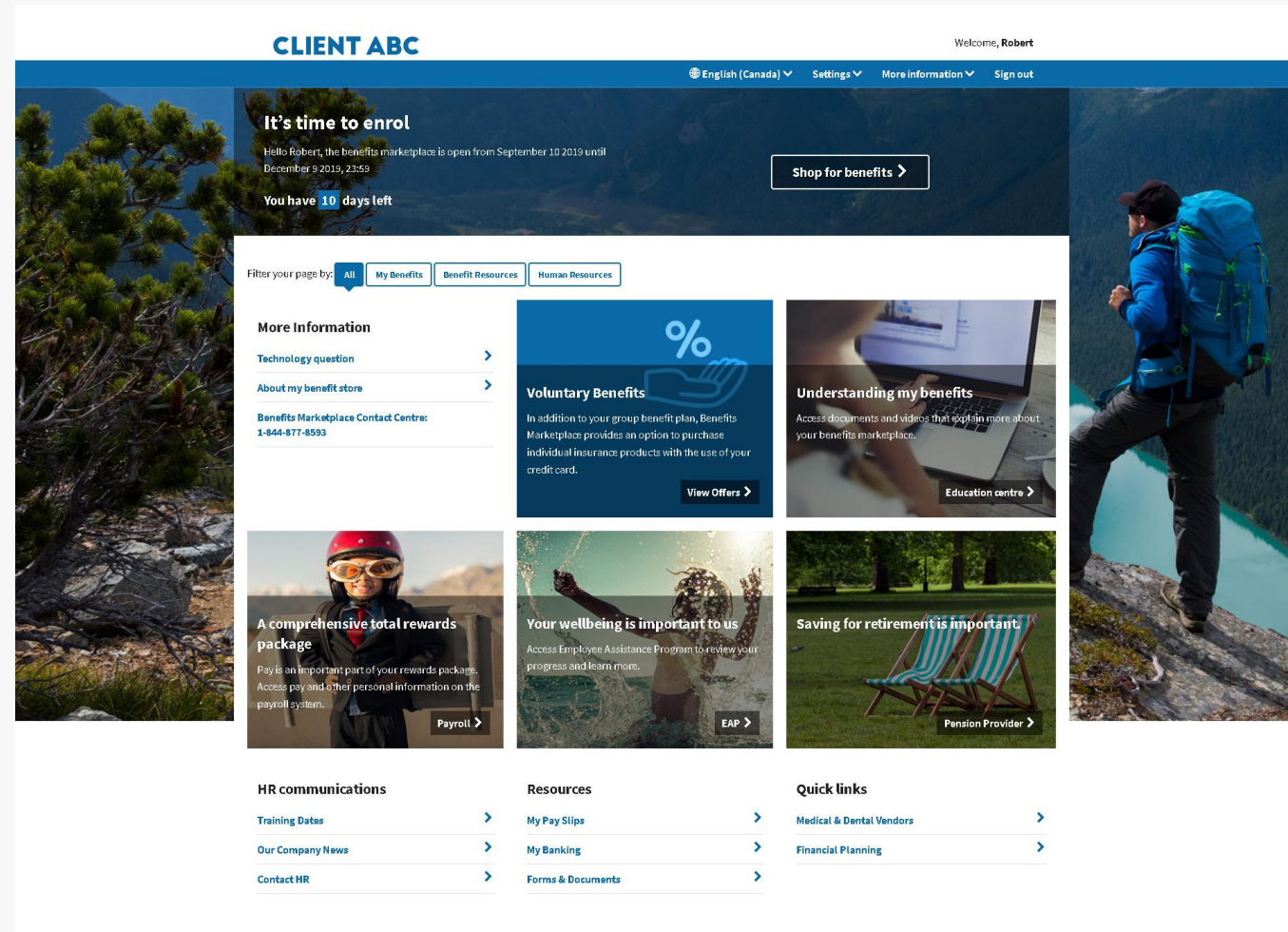
The Problem

The entire platform was built only for the US,
in English, and wasn't Multi–Lingual, Localized
or Internationalized

The Solution

Global Benefit Enrollment Platform

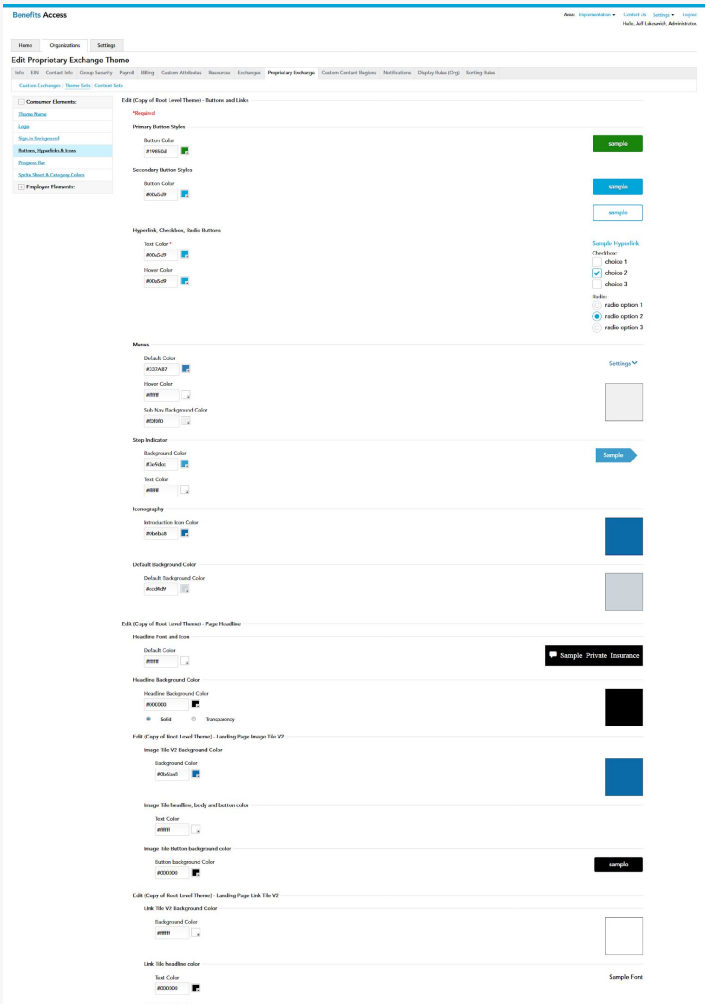|	
Medical	Bike to Work Ins.
Dental	Education Asst.
Vision	Gadget Insurance
Life Insurance	Gym Membership
Legal Plans	Pet Insurance
Pension	Wine Club

"Benefits Access"

Two Part Development

Transform the Admin

New Consumer Experience
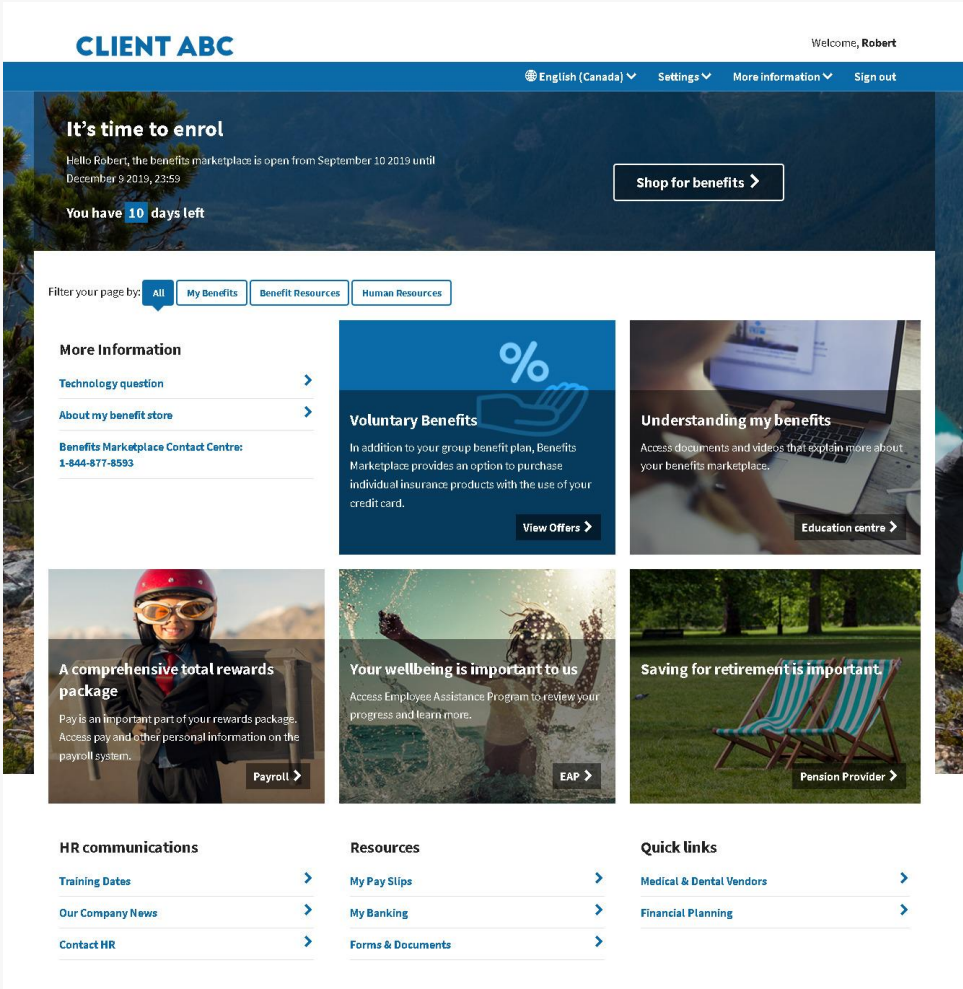
The Team

> I was hired specifically to lead the effort of converting the entire platform to a global solution

> 4 PMs and 3 UI/UX designers worked across 7 scrum teams

> Teams: Tech Lead, 3–5 Engineers, QE and a designated Scrum Master

> Teams were organized by domain expertise

> Product Managers and UI/UX spanned across multiple teams

> Regional stakeholders were consulted and relied upon for feature definition and input

The Process

1. **The Vision:** This was defined by the company prior to me joining

2. **Discovery:** What's needed?
   - Reviewed the platform to determine the scope of the effort
   - High-level list of everything that needed to be developed

3. **Examine:** Feasible, desirable, and viable
   - Deeper dive into each item
   - Created stub tickets for each approved task

The Process (cont.)

4. **Prioritize:** What's needed and when is it needed
    - Worked with Stakeholders to define the MVP
    - The target first launch was to a client in the UK
    - Tasks were organized and prioritized by domain
    - The project plan ended up consisting of 250 features/tasks

5. **Design & Prototype*:** Designed and tested a functional prototype prior to development commencing (when possible/necessary)

6. **Execution**:** The teams developed and deployed

Design & Prototype

7 Main Pages Tested

Ex. Landing Page

Position of the log in link

Tiles vs. Text

Use of imagery

Need for filtering

Responsive design:
Tested Desktop & Mobile

Ex. Store Page

Location-specific Icons

Coloring of Product Categories

Notifications

Accordions Open vs. Closed

Cards vs. Headline Links

Ex. Enrollment Page

Different Product Templates

Treatment of Selected Product

Dependent Selection

Cost Ledger

Plan Comparison

Execution

Started w/ the admin tools that had to be re-architected (ex. translations) and other areas of the platform that were new (ex. products)

As the user experience testing finished, new tasks were identified and slotted in the backlog

Initial deployment consisted of a "happy-path" from Authentication to Checkout

Features were then released iteratively and layered on-top until the MVP was complete and could be deployed

Execution (cont.)

Each team functioned within a set of guidelines and expectations
- Two-week sprints
- Ceremonies differed by team: Refinement, stand-ups, retros, demos...
- Tickets were formatted similarly
- Stakeholder demos, showcasing the progress, were done every sprint
- Project plan and target delivery dates were communicated as the teams progressed

Releases were coordinated and deployed at the conclusion of every sprint

Utilized Feature Flags to toggle the display on/off

Launch

Initial launch was to our colleagues in the UK ("eating your own dog food!")

Feedback was easily obtained
- Live Site Incidents (LSIs) were quickly identified and fixed
- Consumer experience improvements were prioritized in the backlog

Post-MVP deployments were launched based on capabilities and needs

Marketing collateral, including emails to client employees, are completed by corporate marketing team and signed-off by Product

Results

Benefits Access has since been launched to over 100 clients across 35 countries in 30 dialects

Benefits Access was chosen over its main competitor's product as part of a (cancelled) merger between the two organizations

~95% retention rate of those clients that trial the platform

We've exceeded the 2x year-over-year growth plan every year

What did we learn

Attempt to understand the entire scope before development commences knowing there will always be unknowns

Consider regional laws when building a global platform.

Managing Stakeholder expectations (delivery dates) can be difficult

Communicating requirements to Stakeholders vs. Engineers is different

Whenever budget and time permit, designing and testing prior to development will save time and reduce the amount of re-work

Deadline driven development results in short-sighted decisions, tech debt, and burns the team out

Thank You

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