

In making decisions, we strive to:



Engage People

Engage all stakeholders including ETF staff, business partners, members, and employers in the use of the new technology, encouraging them to play an active role in the transformation effort. Employees who use the system feel invested in the outcomes. Changes in technology sustain themselves only if people accept and embrace them.



Enhance the Customer Experience

Enhance customer value by providing more self-service options and a more consistent and effortless experience, remain user-centric, attentive to customer and employee responses, and responsive in the way we incorporate their reactions into the designs.



Business Drives Direction

Change is driven by the needs of the business, organized by capabilities, combinations of systems, processes and functions that deliver value. Our systems, projects, and services cannot be considered successful unless they provide value to our programs and provide an opportunity to improve business capabilities.



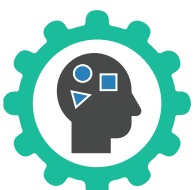
Consider Data an Asset

Develop clear rules and quality standards for data input purposes. Fully utilize the data we receive and work to ensure data is reliable, timely and accurate, and make sure our “golden record” is consistently applied to all systems and reports. Handle data creation, modification and use in compliance with our data governance policy.



Be Agile

Agility is defined as “the ability to move quickly and easily”. This implies flexibility and speed; the expectation of change and the ability to pivot with minimal friction. Modern technology (and likely the business that it supports) will change regularly, calling for internal innovation. The length of our timeline nearly guarantees that we cannot predict at the start what the end will look like exactly. We will implement Lean and Continuous improvement principles such as ‘Just enough, just in time’ and ‘Plan, Do, Check, Act’, to ensure every aspect of modernization is tailored to enhance our agility and ability to innovate. This should include business process design, system requirements gathering, procurement practices, project management, software development and integration, quality management, vendor management, etc.



Provide Capabilities that Fit ETF Needs

Treat technology as a set of capabilities that can be applied, consumed, and integrated as needed. Select and combine products and services from the best providers to suit the organization and product portfolio needs. This shifts the focus from the hardware and software assets to focus on the capabilities that will be provided, further enhancing agility and innovation.



Focus on Value

Choose the most efficient and effective solutions to maintain and deliver capability levels with the aim to automate high volume tasks while simplifying the overall architecture. Focus on core functionality that brings us the highest value and volume that serves the majority of our members. Complex, unclear, and customized solutions and architectures limit our ability to adapt, refresh, and integrate and often require significant effort to make changes resulting in wasted resources. The commitment to continuous simplification and improvement will help reduce and avoid waste, and increase our ability to adapt.



Protect Information

Security and compliance are built into every solution early in each project, and initiative and security principles are followed. Security is implemented using the necessary controls based on industry best practices.



Leverage Proven Solutions

Adopt best practices and standard processes built into applications whenever possible. Leverage what is available out of the box versus creating new. Divergence may occur after critical assessment of need or benefits of doing so. Be open to change.