

## GUIDE

# The Member Communications Operating Model Diagnostic

A practical guide to mapping complexity, cost, risk and control across the lifecycle.





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# How Complexity Builds Across Member Communications

Member communications environments rarely become complex all at once. As work moves across benefit data, content, technology, production and delivery, complexity can accumulate across teams, systems, vendors and controls.

Use this operating model diagnostic to help healthcare payer teams identify where complexity builds across the member communications lifecycle — from benefit and regulatory inputs through content governance, data, technology, production, delivery, and compliance evidence. The diagnostic is designed to help your organization uncover unnecessary operational burden, improve visibility across functions, and prioritize opportunities to simplify execution without disrupting critical controls. The objective is not to eliminate necessary specialization, regulatory oversight, or critical controls. It is to identify where fragmented ownership, disconnected workflows, duplicate effort, and unnecessary handoffs are creating avoidable cost, rework, delay, or risk.

Complexity often accumulates in the handoffs between your teams, tools, data sources, vendors, and controls. A connected operating model makes those dependencies visible earlier, reduces manual workarounds, and helps your teams focus improvement efforts where simplification will have the greatest impact.

## Assess Six Operating Dimensions

Together, these dimensions represent the primary drivers of operational complexity across the member communications lifecycle. Assessing all six provides a more complete view than evaluating process or technology alone.

| Map This   | Ask                                               | Watch For                                                 |
|------------|---------------------------------------------------|-----------------------------------------------------------|
| People     | Who owns, approves, validates, escalates?         | Unclear accountability; too many reviewers                |
| Process    | Where does work move, pause, or loop?             | Manual handoffs; late edits; repeated QA                  |
| Technology | Where can connected technology reduce complexity? | Disconnected systems; duplicate tools; manual workarounds |
| Data       | What files, feeds, and specs drive work?          | Multiple sources of truth; reconciliation                 |
| Vendors    | Who performs or depends on the work?              | Overlapping roles; unmanaged dependencies                 |
| Controls   | What proves accuracy and compliance?              | Late controls; incomplete evidence                        |

# Lifecycle Map: Where Complexity Builds

| Stage                                                     | Primary Work                                                                                                   | Key Handoffs                                                             | Risk / Complexity Flags                                                                                                                                       |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Benefit &amp; Regulatory Inputs</b>                 | Regulatory guidance, benefit design, PBP alignment, required content inputs                                    | Product → Compliance → Member Communications                             | Late or unclear inputs create downstream rework; requirements are not fully mapped to document sections, data fields, inserts, versions, or delivery outputs. |
| <b>2. Content Development &amp; Governance</b>            | Templates, content strategy, governance, review cycles, approvals, version control                             | Business → Content → Compliance                                          | Version confusion, conflicting edits, SME delays, approval bottlenecks, inconsistent content across manually developed versions                               |
| <b>3. Translation Operations</b>                          | Language requirements, translation intake, translated materials, linguistic review                             | Content → Translation vendor / reviewer → Compliance / Production        | Late source changes trigger retranslation; unclear language owner                                                                                             |
| <b>4. Accessibility / 508 Compliance</b>                  | Remediation, testing, validation, evidence                                                                     | Content → Accessibility specialist / vendor → Review / Release           | Late remediation delays release; validation evidence missing                                                                                                  |
| <b>5. Data &amp; Technology Enablement</b>                | Member data files, content rules, companion files, address hygiene, counts, package logic, system connectivity | Data / Enrollment → Communications → Production                          | Disconnected systems create duplicate effort; file changes trigger reruns; manual reconciliation increases error risk                                         |
| <b>6. Production &amp; Fulfillment</b>                    | Print files, proofs, inserts, kitting, assembly, QA, fulfillment readiness                                     | Production → Print / fulfillment partners                                | Proofing loops, package errors, reprints, limited status visibility                                                                                           |
| <b>7. Postage &amp; Mailing Management</b>                | Mail class, IMb, NCOA, postal optimization, postage funding, USPS acceptance                                   | Production / Vendor → Postal operations → USPS                           | Late postage decisions; funding, acceptance, or tracking gaps                                                                                                 |
| <b>8. Delivery Verification &amp; Compliance Evidence</b> | Mail dates, delivery reporting, return mail, proof of mailing, audit package                                   | Communications / Compliance → Vendor partners → Audit / Regulatory teams | Incomplete evidence weakens audit response or delivery proof                                                                                                  |

# Getting Started

## How to Use This Diagnostic

Use the Lifecycle Map with your health plan teams to discuss where complexity appears today. For each stage, assess all six dimensions: people, process, technology, data, vendors, and controls. Use the Diagnostic Worksheet to capture the most important friction points, dependencies, and opportunities.

## Scoring Guide

| Score | Meaning                                                            | Typical Signal                                                                        |
|-------|--------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1     | <b>Controlled:</b> Issues are infrequent.                          | Clear ownership, documented controls, limited rework                                  |
| 2     | <b>Manageable:</b> Issues occur occasionally.                      | Known handoffs with some manual coordination                                          |
| 3     | <b>Complex:</b> Issues require regular manual intervention.        | Multiple systems, vendors, reviews, or repositories                                   |
| 4     | <b>High Risk:</b> Issues frequently cause rework or delays.        | Compressed timelines, unclear ownership, frequent rework, limited visibility          |
| 5     | <b>Critical:</b> Issues regularly threaten delivery or compliance. | Delivery, evidence, accessibility, translation, or production accuracy may be at risk |

## Example: Completed Worksheet Row



### Example Completion

Starting at a blank worksheet can be difficult. Below is an illustrative example of how to complete one row. Your results will be different—this is simply intended to show how the diagnostic works.

| Stage                                      | People / Vendors<br>Owners, approvers, partners, dependencies | Process / Technology<br>Handoffs, tools, systems, repositories                                                                                                 | Data / Controls<br>Files, specs, evidence, approvals                                                               | Score + Priority Opportunity<br>1–5 and top improvement                                                                                                  |
|--------------------------------------------|---------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>5. Data &amp; Technology Enablement</b> | Member Comms Team, Enrollment, IT, Production Partner         | Weekly file exchange via SFTP; manual reconciliation of counts and updates<br><br>Two disconnected systems (CRM and communication platform); Excel workarounds | Member file, address file, content rules, companion file<br><br>Reconciliation report; file transfer confirmations | <b>Score:</b> 1 2 3 <b>4</b> 5<br><b>Opportunity:</b> Automate data exchange and reconciliation; create real-time visibility into counts and exceptions. |

## Diagnostic Worksheet:

# Assess Each Stage Across Six Dimensions

Complete one row for each lifecycle stage in your member communications process. The worksheet groups the six dimensions into three columns to keep the assessment streamlined. Capture the friction points, dependencies, technology gaps, control needs, and improvement opportunities that matter most. If helpful, use the Complexity + Cost Watchpoints after the worksheet for additional prompts. Vendor coordination should be assessed within each stage rather than treated as a separate lifecycle step.

| Stage                               | People / Vendors<br>Owners, approvers,<br>partners,<br>dependencies | Process / Technology<br>Handoffs, tools,<br>systems, repositories | Data / Controls<br>Files, specs, evidence,<br>approvals | Score + Priority<br>Opportunity<br>1–5 and top<br>improvement |
|-------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------------|
| 1. Benefit & Regulatory Inputs      |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 2. Content Development & Governance |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 3. Translation Operations           |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 4. Accessibility / 508 Compliance   |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 5. Data & Technology Enablement     |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |

| Stage                                          | People / Vendors<br>Owners, approvers,<br>partners,<br>dependencies | Process / Technology<br>Handoffs, tools,<br>systems, repositories | Data / Controls<br>Files, specs, evidence,<br>approvals | Score + Priority<br>Opportunity<br>1–5 and top<br>improvement |
|------------------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------------|
| 6. Production & Fulfillment                    |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 7. Postage & Mailing Management                |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |
| 8. Delivery Verification & Compliance Evidence |                                                                     |                                                                   |                                                         | Score: 1 2 3 4 5<br>Opportunity:                              |

## Complexity + Cost Watchpoints

As your team completes the diagnostic, consider whether any of these conditions contribute to unnecessary complexity, rework, delay, cost, or risk. Focus on the strongest signals of hidden operational burden rather than documenting every possible task.

- Late source-content changes triggering retranslation or remediation
- Duplicate systems
- Unclear ownership for language, 508, postage, production, or vendor decisions
- Manual file transfers
- Disconnected systems, duplicate tools, or manual workarounds that mask true effort
- Email-based approvals
- Data or content changes that force reruns, proofing loops, or downstream rework
- Limited visibility into print, fulfillment, mailing, or delivery
- Multiple repositories
- Compliance evidence collected after the fact
- Spreadsheet tracking
- Postage planning after production starts
- Lack of workflow visibility
- Overlapping vendor responsibilities
- Duplicate data entry

# Identify Where to Focus First

Which three stages create the greatest operational burden for your plan today? Where would simplification, connected technology, clearer ownership, vendor alignment, or stronger controls most improve speed, accuracy, cost, or confidence?

**Priority Opportunity Areas:** Clarify ownership at each stage; standardize source files, data specifications, and templates; connect content, data, production, and evidence workflows where possible; move translation and accessibility/508 planning earlier; strengthen production readiness controls; coordinate postage strategy before mailing; define vendor handoffs and escalation paths within each stage; and retain audit-ready evidence across the full lifecycle. Use your completed diagnostic to identify the top three opportunities most likely to reduce complexity, cost, rework, or compliance risk.

## Prioritize Your Top 3 Opportunities

| Priority | Stage | Issue / Gap | Recommended Action | Owner / Next Step |
|----------|-------|-------------|--------------------|-------------------|
| 1        |       |             |                    |                   |
| 2        |       |             |                    |                   |
| 3        |       |             |                    |                   |

Organizations with high scores across multiple lifecycle stages often experience recurring rework, limited visibility, fragmented ownership, and higher operational costs. The most effective improvement efforts typically focus on simplifying handoffs, improving governance, connecting technology, and increasing workflow transparency.

# Turn Your Diagnostic Findings Into Action

If disconnected workflows, repeated reviews, multiple systems or fragmented ownership are creating unnecessary burden, greater coordination can help improve efficiency, control and execution.

Imagenet combines purpose-built technology and operational services to help payers better connect Member Communications from benefit data and content through production and member delivery.



Connect Data +  
Governance



Coordinate  
Content +  
Workflows



Strengthen  
Production +  
Delivery

Learn more about how Imagenet can help reduce complexity across your Member Communications environment.



**Scan to Explore  
Member Communications**





**Smart Healthcare Operations.**  
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