

# Case Study: Stabilizing Renewal Outcomes Through Data Governance & Lifecycle Design

## Overview

In a Salesforce Health Cloud payer environment (Vlocity/OmniStudio), renewal quotes produced recurring defects including incorrect tiering, missing rates, and proposal inconsistencies. Rather than treating these as isolated issues, I identified a systemic gap in the renewal lifecycle and designed a governed solution aligned with user-centered and program delivery principles.

## Problem Identified

Renewals relied on prior-year member data without validation against current population changes. Census inputs were incomplete, inconsistent, and unverified. The platform lacked a reliable model for subscriber and dependent relationships, leading to incorrect tiering and rating errors.

## Root Cause

Lack of governance between census input, member relationships, and rating logic.

## Objective

Ensure data integrity before renewal execution, enable accurate tier and rating determination, and eliminate recurring defects at the source.

## Solution Delivered

- Established Held Product Relationship (HPR) as the system of record for member-dependent relationships and household structure.
- Introduced a pre-renewal validation gate to reconcile census data against prior enrollment and detect anomalies.
- Redesigned the lifecycle: Census → Validation → HPR → Rating → Quote.
- Ensured tier assignment and rating logic were based on validated, structured data.

## Renewal Lifecycle (Before vs After)

Before	After
Prior Data → Auto Renew → Rating → Quote	Census → Validation → HPR → Rating → Quote

## Results

Eliminated root causes of renewal defects, improved data integrity, reduced manual rework, and stabilized renewal outcomes across segments and rating models.

## Relevance to Fearless Role

This work demonstrates the ability to deliver user-centered, high-impact solutions in complex public-sector-style environments. It reflects strengths in stakeholder alignment, lifecycle ownership, and designing equitable, reliable systems—directly aligned with Fearless' mission-driven product delivery.