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30-60-90 DAY ACTION PLAN BRYANT LISTER | TRELLA HEALTH VP OF DATA STRATEGY

Days 1 to 30: Assess, Stabilize, and Align

Objective: Establish credibility, understand the current state, and identify immediate risks and quick wins in data governance, quality, and AI readiness.

- Meet one-on-one with the CEO, CTO, Chief Product Officer, General Counsel, Chief Compliance Officer, and Chief Information Security Officer to understand strategic priorities, regulatory posture, and existing data investments.
- Audit the current data platform architecture across claims, clinical, and operational domains. Map data sources, lineage, quality scores, and integration points. Identify shadow systems, duplicate data stores, and ungoverned AI use cases.
- Review existing HIPAA compliance posture, Business Associate Agreements, and any pending audit findings or OCR inquiries. Confirm no active regulatory exposure is unaddressed.
- Inventory all production and pilot AI/ML models. Document use cases, data inputs, oversight mechanisms, and documented outcomes. Flag any models operating without documented governance or human-in-the-loop controls.
- Establish the Data Strategy Council with representatives from Product, Engineering, Commercial, Legal, Compliance, Security, and Clinical Operations. Define meeting cadence, decision rights, and escalation paths.
- Deliver a 30-day Current State Assessment to the executive team, highlighting top three risks, top three quick wins, and a preliminary 90-day roadmap.

Days 31 to 60: Govern, Standardize, and Roadmap

Objective: Build the governance framework that enables safe AI expansion and connects data investments to business outcomes.

- Draft and socialize the Trella Health Data Strategy Charter, covering data ownership, stewardship, metadata standards, business glossary, information classification, quality thresholds, and lifecycle management. Align with HIPAA, 42 CFR Part 2, and emerging healthcare AI regulations.
- Launch the Responsible AI Governance Framework for post-acute care specific use cases. Cover use-case intake, acceptable use policies, bias testing, privacy review, vendor assessment, data quality validation, human oversight, and outcome measurement.
- Map data lineage across the full post-acute care continuum: acute discharge, skilled nursing, home health, hospice, long-term care, and readmissions. Identify fragmentation points that prevent unified analytics and reporting.
- Initiate a master data management and reference data standardization project for patient identifiers, provider networks, facility codes, and payer contracts. Select pilot domain based on highest business impact and lowest integration complexity.
- Partner with Engineering and Product to align the data platform roadmap with the product release calendar. Ensure governance gates are embedded in CI/CD and model deployment pipelines, not applied after the fact.
- Present the 12-month Data Strategy Roadmap to the Board or executive committee, including investment requirements, hiring plan, risk mitigation, and outcome KPIs.

Days 61 to 90: Enable, Scale, and Measure

Objective: Demonstrate measurable progress in data quality, governance maturity, and AI oversight that supports Trella's expansion into operational and AI-driven domains.

- Deploy the first governed AI/ML model into production under the new Responsible AI Framework. Document the full lifecycle: intake, approval, training data provenance, bias audit, security review, human oversight, and post-deployment monitoring.

- Establish and publish the first quarterly Data Quality and Governance Scorecard. Track metrics including: data completeness by domain, lineage coverage, stewardship assignment coverage, policy adherence rate, and time-to-governance for new data products.
- Complete hiring plan for the Data Strategy organization, including data governance managers, data stewards, and AI ethics/oversight roles. Begin recruiting for critical path positions.
- Launch a data literacy and stewardship training program for business unit leaders. Ensure Product, Commercial, and Clinical Operations understand how to request, classify, and govern data assets.
- Conduct a third-party readiness assessment for HITRUST or SOC 2 Type II certification, if not already held. Align security, privacy, and data governance controls to industry-recognized standards.
- Deliver the 90-day Outcomes Report to the executive team, showing progress against the 30-day assessment, governance maturity improvements, and business impact of the first governed data and AI initiatives.