



Transforming Behavioral Health Services

Health Insurer – Operational and Organizational Redesign

In order to reduce operating costs and improve customer satisfaction levels, a large integrated national health insurance company made the decision to try to simplify and standardize their operating processes and workflows across the multiple sites of their national behavioral health business. The organizational transformation included migrating to a common information systems and technology platform and redesigning processes and procedures to establish a consistent national standard.

Historically, the behavioral health business has grown as a result of the acquisition of multiple regional-based plans. Their expansive core network is a competitive advantage as it offers convenient access to multiple levels of care for all members. However, as they acquired these regional-based plans, they did not integrate them into the new entity. This resulted in a highly matrixed and distributed delivery model with inconsistent capabilities and service delivery across multiple disparate platforms. This increased complexity and inconsistent communication for providers and members who contacted the various locations of the business and decreased provider and member satisfaction.

The behavioral health business engaged Advanta to help improve their overall experience with call centers; provide consistent information across the organization; provide better communication across multiple communication channels; reduce administrative burdens; and improve claims processing. The transformation consisted of a multi-focused initiative which included the improvement of operational processes, process redesign, and employee and office location changes. There were multiple individual projects within each program.

Advanta provided expertise and resources to fill key roles in all aspects of the project including: overarching transformation guidance and support, program and project management, industry and technology subject matter experts, and business-systems analysis. As a result of the transformation initiative, the behavioral health business successfully redesigned the organization to achieve improved customer service levels and reduced operating costs by over \$100 million.

The Client's Challenges

The primary challenges facing the team:

- The organization consisted of multiple physical locations across the nation that was the result of multiple business acquisitions over the past decade or so. This structure created a lack of consistency in terms of operating processes, procedures and practices that reduced customer service levels and increased operating costs.
- Various access channels, e.g., IVR, call center staff and web portals, were not synchronized in terms of functionality and quality of information. The various access channels were the responsibility of a wide range of leaders within the business and the business' holding company.
- The information systems enabling the business processes and procedures varied across the behavioral health business making it difficult to create a total business view of performance.
- There was a shortage of internal resources with experience in program and project management for such a large organizational transformation.

The Advanta Solution

Advanta provided a range of overall program office services and individual project implementation support for the business' organizational transformation. The program office services included:

- Overall strategic and business planning;
- Organizational change management and communications support;
- Risk and issue management;
- Program and project performance monitoring and reporting; and
- Business case development.

Within several of the projects, the Advanta team staffed resources to elicit and document process models and business requirements; coordinate and integrate

business requirements across projects and with the Information Technology Department; and produce all project-related business requirements artifacts. This included, but was not limited to, business requirement documents and requirements traceability matrices. Advanta staff provided data and business analysis to support the creation of a common data set to support business operations. In addition, Advanta provided project management for five of the projects within the initiative as well as program management of one of the programs. In these roles, Advanta was

accountable for the development of project workplans and driving the teams to successfully complete tasks. Advanta provided a range of industry subject matter experts to support various project teams. These included process modeling and design, workload categorization and queuing, and clinical triage.

The common information systems and technology platform consisted of three key commercially available systems: claims adjudication and management (TriZetto Facets), knowledge management (KANA) and automated workflow (Pegasystems). Once the redesign of the behavioral health business started, the decision was made to utilize KANA and Pegasystems to enable specific parts of the operational redesign. To address the lack of consistency in content and methods across the nation, KANA was implemented as the single information repository or source-of-truth. Pegasystems was adopted as the system to enable the movement and queuing of work to the next available resource or Customer Service Representative (CSR). Advanta supported the design, build and deployment of both KANA and Pegasystems.

As part of the operational and organizational redesign effort, the team:

- Provided a senior level manager with experience in Facets to lead the efforts in the decommissioning of the multiple vendors and aid the movement towards a common platform.
- Supported the design, build and deployment of both KANA and Pegasystems.
- Provided business case and analytical management and resources.
- Compiled and analyzed a comprehensive list of data elements from across the behavioral health business and developed a single source-of-truth.
- Identified process workflow opportunities and developed capabilities to support tiered levels of providers service/experience. The team reviewed and analyzed calls and web inquiries that came in from members and providers.
- Created tiered levels of calls consisting of types of calls, how they are handled, and the skill set needed to address the inquiries (e.g. member questions regarding co-pays vs. clinical questions). Recommendations were made for addressing inquiries, by identifying the correct staff with the right skillset and role for each type of inquiry.
- Analyzed and provided recommendations for improved use of telephony and web interactions, and Interactive Voice Response (IVR) and web portal.

The Results

As a result of the team's support and services, Advanta assisted the behavioral health business in successfully redesigning their organization and achieved improved customer service levels and reduced operational costs in excess of \$100 million.



The quality and consistency of service delivery across the behavioral businesses was improved. The number of systems and departments/organizations in addition to a large amount of manual documentation were streamlined. Provider and member satisfaction improved as a result of streamlined processes, reduced rework, and increased consistency across the business. Additionally, a more effective functional design was implemented which improved the use of shared service, outsourcing, real estate, governance and decision making. Administrative burdens were reduced to both providers and the behavioral health business, and faster and more accurate issue resolution was implemented. A more accurate and consolidated data management technology was established, which significantly reduced redundant entry and data quality issues.

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