



Case Study



Service and Operational Insights

Agile, Real-Time Reporting to Manage Day-to-Day and Long-Term Business Objectives



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Business Challenge

The largest and most trusted provider medical insurance compliance services in the United States was experiencing major analytics headaches. A majority of its service offerings involve the development of complex work files containing medical cost projections and assessments relating to insurance and legal claims. Managers and executives had little visibility into how well they were doing meeting the needs of their operations. Data was tracked and managed through a series of Excel spreadsheets and documents stored on shared server folders that could not be timely analyzed or aggregated to support operational plans. Attempts to report on departmental information was labor intensive and the quality and integrity of that data was in doubt at all levels of management.

Solution

The company selected eVerge for the implementation of a business intelligence solution to support CRM customizations and integrate with a real-time transactional database. The new reporting business models were designed to be intuitive and compliment the centralized repository of customer data in the CRM system.

Ultimately three primary dashboards were developed. The executive analytics dashboard provides management with administrative services, clinical services and executive data for overall management of the organization. The operations dashboard provides department reporting across the business process: Records, Clinical, Pharmacy, Financial, Medicare, Submission, Case Review, and Overall Operations. The sales and marketing dashboard provides the company with client level detail reporting to support incremental revenue generating services.

Results

The integrated business intelligence solution implementation has enabled the company to manage its business more efficiently, deliver a higher quality of service to its clients, and support incremental revenue-generating services:

- Reporting is now more agile, accurate and less resource-intensive
- Users can create their own reports using an intuitive user interface
- A centralized repository tracks a case through the business process
- Real-time analytics of work throughput allows for optimal resource allocation based on the workload in the pipe
- Real-time analytics enables managers to measure daily work to weekly goals

Industry

- Insurance
- Healthcare

Key Success Factors

- 800+ custom data warehouse extensions
- Custom business models for data warehouse and real-time analytics
- Dashboards for executive analytics, operations, and sales and marketing
- 600+ reports
- 90 percent reduction in resources required to produce reports
- Elimination of 80 hours per month associated with researching cases

Client Feedback

"eVerge has been a tremendous partner and has been with us every step of the way. This project was critical to our continued existence and eVerge stepped up as a partner. We couldn't have made a better choice in either the software or the implementation partner."

- CEO and President