



DELIVERING MISSION-CRITICAL EDI



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Problem to Solve

Over the past 20+ years, electronic data interchange (EDI) protocol has been a game-changer for the health care industry, offering unprecedented new levels of data management productivity, security and cost savings. With higher levels of EDI success, however, come higher levels of user expectations.

That was the dilemma faced by a growing management services organization (MSO) seeking to expand its business in additional states. Growing client demand and expectations for the MSO's EDI capabilities had placed a strain on the MSO. As the MSO's leaders prepared to go live in two new states, they also needed to decide between making capability maturity enhancements to ease EDI scalability needs versus simply scaling up using existing EDI capabilities.

If the MSO scaled up its current capability, without enhancements, it would put stress on the MSO's workforce and increase the risk of employee burnout and attrition. It would also likely mean temporarily overlooking established and formalized best practices, to meet tight go-live deadlines, increasing the risk of delivering a lower-quality outcome. Lesser quality would likely lead to unhappy clients, re-work and additional stress on the MSO's resources.

To help ensure that the MSO could meet its go-live deadlines while simultaneously resolving the firm's EDI demands, the MSO's leaders engaged Freed Associates (Freed) to analyze, assess and



address the MSO's EDI needs. The MSO selected Freed based on its prior familiarity with the MSO, as well as its specific strategic and tactical expertise in EDI management.

Strategy and Tactics

Early on, it became apparent that the most sensible route for the MSO, from a financial and business standpoint, would be to enhance its EDI capability maturity and scalability simultaneously. Thus, much of Freed's analytical work consisted of learning the current state of the MSO's EDI environment and noting areas for improvement around discipline and utilization of the existing tool set and methodology. This also led to Freed documenting repeatable processes for the benefit of the MSO's own EDI analysts.

Midway through this engagement, the MSO's EDI management changed. This necessitated Freed stepping into the manager role in an interim capacity. In this role, Freed oversaw the daily activities of the EDI team, to ensure that an inevitable backlog of requests would be addressed in an efficient and prioritized manner. Freed also led and coached individual EDI team members through more complex EDI tasks, on-boarded additional staff as needed, and documented all work to ensure a smooth hand-off of responsibilities to a permanent manager.

Results and Conclusion

After EDI analysis, development, tests and creation of new or modified job definitions, the MSO was ready for its go-live in two new states. In total, Freed led the completion of 15 new or modified EDI job definitions in support of the go-live effort.

In addition, throughout this engagement, Freed documented all resources and standards to be utilized by the MSO's EDI team. This effort revealed three major issues (two of which were "urgent") and three critical risks (one of which was "urgent"). This work benefitted the EDI department by generating material for the team's reference and improved the team's ability to adhere to standards.

Freed oversaw all staff management responsibilities, monitored and managed all EDI workstreams, and helped hire additional staff, including a new EDI programmer/analyst and EDI manager. Freed's documentation of the EDI manager role proved immensely valuable when the time came to hand off managerial responsibilities to the permanent manager.

Freed's involvement in this EDI project, as tactician, strategist and team leader, proved critically important to the MSO's new business success. Freed's ability to deliver both tactical skills and strategic insights, allowed the MSO to achieve its new market go-live dates, and ensure the MSO's future business interests.