Freed Significantly Improves HMO's IT Business Intelligence Team Performance

Swamped by a doubling of its membership, an HMO's IT business intelligence (BI) team was struggling to correctly keep up with internal project requests and priorities. Freed Associates stabilized the BI team's performance by developing an improved service strategy and tools.

Introduction

For centuries, naval officers have used the command "all hands on deck!" to signal a ship's entire crew to assemble on deck, usually for a major announcement, event or emergency.

What happens when there's not enough experienced staff to respond to an "all hands" call?

That was the dilemma faced by a non-profit health maintenance organization (HMO). This HMO had quickly doubled its membership due to the Affordable Care Act and Covered California Medi-Cal expansion. The HMO's IT business intelligence (BI) team had not grown accordingly and was staffed with developers with little or no previous health plan analytical experience.

The BI team struggled to keep up with internal project requests and priorities, particularly around reporting requests, documenting requirements, testing scenarios/results, and planning for handoffs to testers and business stakeholders. The delays threatened to impair the HMO's business performance. The BI developers did not understand the questions to ask their business team leaders to get to the underlying needs of the project requests. The developers had the skills to access and build the data requests; they did not have the health plan analytical

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skills to understand nuances or relationships to derive accurate requirements.

As a result, the BI team built reports and projects that technically worked but did not meet the organization's needs. The HMO experienced constant re-work, frustration and missed deadlines for internal and external projects.

The BI team needed a senior leader to mentor existing staff, assist with business analysis and reporting functions and define a strategic path for the team to meet the overall organizational strategy. The HMO retained Freed Associates (Freed) to provide the BI team with the strategy and tools to meet the following goals:

1. Stabilize the BI team's performance and its ability to effectively respond to internal requests

2. Identify and streamline the BI team's report prioritization and project build processes and operations

3. Create a way for the BI team to evaluate the level of work needed for projects and estimate dates for key hand-off points

4. Compose tools to coach the BI team regarding critical thinking and support team members in developing business analysis skill-sets

5. Establish a process to empower collaboration and understanding among the BI and business teams to produce more precise project requirements, improve testing outcomes, and decrease project request turn-around times

Strategy

A new BI director had been hired but had not joined the client, prior to this engagement. Freed's lead consultant initially met with the HMO's CIO and acting BI director to collect background and historical information about the BI team, and plan transition support for the incoming director.

Freed met individually with each of the BI team members, including developers, database administrators, quality reviewers and several other IT managers. Critically, Freed also met with the department's internal business customers to get their perspective on BI team performance. This information helped identify the BI team's strengths and weaknesses, including identifying changes that would have an impact and understanding the different types of organization needs and perspectives.

Freed's strategy focused on creating a new set of work flows for BI team project requests, requirements gathering, and delivery processes. Based on the strategy, the following seven functional areas were addressed:

1. Receipt and prioritization of initial requests from a business team

2. Requirements gathering, design documentation, and hand-off estimations of requests

3. Developer build, unit test, and peer review processes

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4. Change control, review, and re-estimation processes

5. User acceptance testing scenario development and testing documentation processes

6. Deployment processes

7. Stabilization and support processes

Freed also created a new service level agreement (SLA) between the business clients and the BI team. The SLA defined responsibilities for each business team involved in the project requests, the performance objectives, the documentation and sign-off requirements at milestones, the project quality measurement standards, and project success definitions and internal satisfaction reporting of all involved with each project. Given the relative inexperience of the BI team and the increased responsibility of the business teams in the requirement gathering process, the new SLA was crucial for establishing expectations for timing, deliverables and process improvement measurement.

Tactics

With input and feedback from end-users, managers, and related departments, Freed developed customized tools for collaborative use by the BI team and its business clients. These tools included:

• **Requirements gathering tool** – Designed to be shared by both the business user and the developer/analyst, this tool helps all parties quickly and easily document requirements and record design to those requirements. The IT analyst or developer will use this information as a springboard to clarify and begin to design the report.

• **Requirements gathering tip sheet** – The requirements gathering tool included a tip sheet to help the business user specify requirements and more efficiently speak with the developer. It also helps the IT designer know the kinds of questions to ask about each requirement to make sure the design is accurate and will successfully complete UAT testing on the first pass.

• **User Acceptance Testing (UAT) tool** – Designed to be shared by the business user and IT, the UAT tool allows the business user to document the appropriate test scenarios. For developers, this tool serves as both a design and build guide.

• **Level of effort and project estimation tool** – Based on the needs of the BI director and CIO, this tool calculates the total number of business days/hours required by project as well as, estimates dates for planned hand-offs between the business and IT teams. The estimation tool, includes a full user guide including pop-up instructions on every entry line. The tool was designed and developed to be easily updated and refined by department managers based on project and process changes in the future.

Freed provided group and individual training on these tools for all of the BI team's end-users as well as all of the IT

department managers. The owners of the documentation and tools were also trained to make ongoing changes to fit the organization's future needs.

Results

The BI team work flow processes significantly improved – a huge benefit to the BI team's new director and team members. The BI team is now using a set of customized tools that integrate into their processes. These tools helped the department document its work more efficiently and reduced testing errors and sign-off delays. The BI team's internal business clients were pleased with all of these work flow enhancements.

At the end of this engagement, the entire IT team, including staff members handling configurations, application development and operations, also began using the newly designed project estimation tool. IT team member satisfaction was increased due to having a more objective tool to size a project. They provided feedback that they appreciate having a visual tool to spur practical and timely discussions with business leaders regarding project change requests and scope creep effects.

Conclusion

Within a short timeframe and with limited resources, Freed was able to help the HMO's BI team achieve transformational performance results. The support and strategy that Freed provided to BI team members enabled them to bridge personnel shortages and prepare for future nimble onboarding of new staff. The custom tools that Freed provided helped induce and enable analytical thinking and design among the business and BI teams for more successful and timely reporting structures.

All of the IT department teams gained a foundational guide to provide more effective business services. These teams are also better equipped to produce critical deliverables more quickly and efficiently in order for leadership to make opportune health plan business decisions in the future.

Testimonial

CIO of the HMO:

"I have worked with many consulting firms in the past, and was amazed at the level of professionalism, output, quality, and expediency Freed delivered in helping us streamline our analytics project evaluation process. With very little guidance, Freed developed an estimator tool, working with multiple stakeholders to distill the business requirements, formulate a solution and process to manage. I have been really happy with the results and intend to utilize Freed as an integral partner for our organization."

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