

# ENRICHING THE HEALTHCARE MEMBER EXPERIENCE

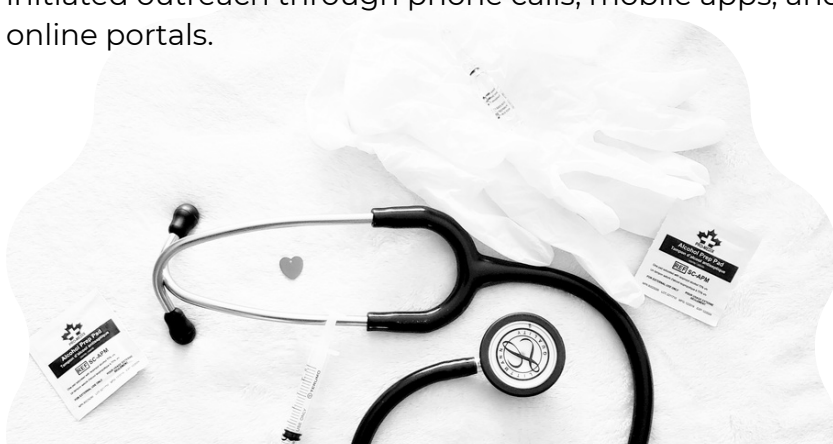
How Kenway Consulting Rapidly Steered a Troubled Program Toward Success and Built an Industry-Leading Health Plan Portal to Improve the Member Experience



Rivaling the growing importance of the patient experience offered by healthcare providers is the member experience offered by healthcare payors. Health insurance is one of the lowest-rated industries when it comes to consumer satisfaction; however new platforms, engagement techniques, and emerging technologies provide health insurers the opportunity to boost engagement and brand loyalty.

Consumers expect the same level of convenience and access to be offered by their health insurers as are provided by virtual care and telehealth organizations. A 2021 J.D. Power survey found that 32% (nearly 1 in 3) of commercial health plan members said that they connected with their health plans within the past year via web, mobile app, or text message, the highest percentage ever.

A differentiated member experience can drive meaningful, sustainable value for payors. While tremendous progress is being made, many health plans have a long way to go when it comes to optimally managing member interactions with intelligence, automation, and personalization, including member-initiated outreach through phone calls, mobile apps, and online portals.



## CLIENT PROFILE

### INDUSTRY

- Healthcare

### CLIENT

- Pacific Northwest Health Insurer

### SOLUTION

- Salesforce Omnistudio Member Portal

## PROBLEM STATEMENT

A large healthcare services organization needed to respond to a growing number of complaints about their user experience. To implement change, the organization developed a multi-year program but ran into challenges in executing and delivering on time. They reached out to Kenway to help identify the causes of the delays, right-size the program, and ultimately deliver an enhanced user experience.

# THE SITUATION

A multi-year initiative comprised of operating model changes and investments to modernize internal and market-facing technologies included re-platforming existing technologies to a Salesforce stack with Health Cloud and OmniStudio. This portion of the initiative was broken out into three phases:

- **Phase I** – Define requirements to design a 360-degree, white-glove member care infrastructure, inclusive of an operating model, redefined roles and responsibilities, and supporting technology
- **Phase II** – Refactor existing Microsoft Power BI dashboards to native Salesforce Health Cloud console screens for use by internal customer support agents
- **Phase III** – Reimagine, redesign, and refactor the existing member portal using Salesforce Health Cloud and OmniStudio

Phase III began in November with the construction of a reimagined member portal experience. Early the following year leadership began to see signs of struggle on the program and Kenway was engaged in June to complete an assessment of the program.

## CHALLENGES IDENTIFIED

### MISSING REQUIREMENTS

Uncertified scope and undocumented requirements resulted in a development team coding according to mockups without defined tasks and acceptance criteria. This led to unstructured development and lengthy, vague working sessions without defined timelines.

### INACCURATE TIMELINE

Lack of detailed requirements hindered tracking and estimation. This resulted in uncertain timelines, with minimal use of timeline visualizations. Only about 10% of development occurred between in the first 6 months, making it impossible to launch the platform to a large user base in a regulated industry within the required timeline.

### INADEQUATE PROJECT MANAGEMENT

Essential project management documents were neglected or absent. For instance, the RAID Log had only six outdated risks, and the project timeline was inaccurate. This lack of up-to-date information left stakeholders without a clear view of the project's status or the ability to plan effectively.

### COMMUNICATION GAP

Development and testing teams were located in India while project managers, business analysts, and Salesforce architects were onshore which caused communication challenges.

### UNCLEAR ROLES AND RESPONSIBILITIES

Undefined roles and responsibilities, along with the absence of clear requirements and scope, resulted in committee-style decision-making. A single influential stakeholder's dissenting opinion could halt consensus, impeding progress in this client environment.

### DEFICIENT STAFFING

Upon completing the initial assessment and requirement documentation, a capacity plan revealed the team was severely understaffed. Estimates indicated the team would need to nearly triple in size, from 8 to approx. 20 developers, to have a realistic opportunity to meet the deadline.

### HIGH TECH RESOURCE TURNOVER

During the dev phase, the tech industry was booming leading to frequent turnover within the dev team in India. This constant cycle of hiring, onboarding, and training resulted in significant reduction of productivity.

### OMNISTUDIO EXPERTISE

Salesforce OmniStudio, though promising, was relatively new at the time. Finding experienced developers was nearly impossible, leading the team to rely on a learn-as-you-go approach with support from developers and architects as needed.

### LACK OF TESTING

Testing lacked rigor, with no procedures for unit, regression, or quality assurance testing. Additionally, no strategies, plans, or materials for integration, user acceptance (UAT), or performance testing. While initial focus was on development issues, preparing for testing was critical.



## THE SOLUTION

Given the volume, variety, and severity of risks and issues across the program, it was imperative that Kenway act quickly to begin transparent, tactful messaging with program leadership, provide recommendations to achieve the objectives, and prioritize efforts to bring rigor and accountability across the program. After evaluating various scenarios and pressure-testing assumptions exhaustively, it was determined that the September 2022 launch timeline was not feasible. The target delivery date was pushed out by 3 months, and the project team was expanded.

The path Kenway pursued to address the challenges focused on delivery quality and velocity.

### Requirements

Kenway needed to document, categorize (e.g., must-have vs. nice-to-have, functional vs. technical), and prioritize requirements. The team chose Microsoft Azure DevOps (DevOps) to manage all requirements centrally, dynamically, and visibly. A project structure was established, requirements documented and knowledge shared across stakeholders.

Introducing rigor to managing requirements required significant effort, patience, and emotional intelligence. Introducing precision and accountability required a shift in behavior across the program. While stakeholders appreciated the control of and visibility into scope, leaders quickly realized tradeoffs when prioritizing features.

### Estimates

Estimating scope ran parallel with requirements and was later embedded within the program. The process was led by a Kenway Salesforce Architects and rationalized by a longtime developer to ensure multiple perspective. Estimates took the form of hours, not points. This method is often best left for mature teams. Estimates considered other non-development activities, such as:

- Unit testing
- Code reviews
- Quality assurance testing
- Deployments
- Rework and/or incorporation of feedback

### Agile

Rigor, transparency, and accountability are critical to managing scope, and the Agile scrum methodology was selected. Kenway introduced Agile principles bringing transparency into and control of scope. Given the desire for transparency adoption across the program was high.

## Staffing

Increasing the size of the development team was inevitable. Following a recruiting dash, the number of developers increased from 8 to more than 20. Capacity was also added to testing, architecture, and project management teams. Nearly half of the new development capacity was provided by Kenway, thereby mitigating a variety of issues by:

- Bringing Salesforce OmniStudio expertise and skills
- Allowing for two development sprints to run simultaneously
- Increasing coordination between development and product teams
- Diversifying holiday schedules (e.g., offshore development teams observing national holidays while onshore teams are in the office, and vice versa)
- Reducing the development team's collective turnover, thereby increasing the rate at which subject matter knowledge was retained

## Testing

Three dedicated phases planned: performance testing, integration testing, and user acceptance testing (UAT). Given the complexity of the application, volume of users, and sensitivity of the health insurance industry, the level of detail and rigor applied cannot be understated. Hundreds of permutations of test members used across hundreds of test cases by dozens of team members resulted in thousands of unique scenarios tested.

## Launch

Under normal circumstances, a phased rollout would have been recommended to limit the impact of production issues as identified. However, due to contractual commitments to the health plan's clients and technical complexities associated with segmenting users', the decision was made to release the portal to just over 100,000 members in a "big bang" approach.

The schedule was defined to the minute and responsibilities were defined to the click. Launch was scheduled during low-traffic business days, with release occurring during hours of near-zero activity to limit the impact on users. The final deployment process began five days in advance of the scheduled release, with each day consisting of closely controlled deployments, intensive smoke testing, expeditious fixes of defects, and multiple gates of approval required before moving to the next day's activities.

## Capacity Planning

**While the science of mapping demand against supply is straightforward, the following need to be considered**

- **Art vs. Science** – Capacity planning is as much an art than it is a science. Careful attention is paid to assumptions. Incorporating assumptions is crucial for paid time off, holidays, rework, testing, dependencies, time spent in meetings, and more.
- **Diminishing Returns** – When evaluating plans, it can be tempting to succumb to the belief that adding resources will resolve all issues. While there is merit to onboarding , adding resources can have diminishing returns.
- **Hope** – One must distinguish hope vs. optimism. Optimism is vital to morale and team motivation. Hope, on the other hand, can serve as a disguise for complacency. "Hoping" development will take less time, testing will go smoother, and issues will resolve themselves should not be incorporated.

## THE RESULT

When external health plan members began logging in to the new desktop application during normal business hours, six low-impact issues were identified, all of which were resolved within minutes. Even fewer were identified on the second business day, and by the next week, no new issues were identified in production, resulting in a seamless application release.

While the launch can be considered a resounding success, it should be taken within the context of the journey preceding it. The challenges encountered throughout required substantial mental, emotional, and financial investments. Many, if not all, of these costs were avoidable, and should serve as a testament to the level of diligence that Kenway recommends should be woven into the management of technology transformations.

If you're interested in learning more about how Kenway can help your organization through its next transformational initiative, large or small, contact us.

