NICE®

CareSource™

Customer Profile:
Healthcare

Website:
www.Caresource.com

Locations:
Dayton, OH; Indianapolis, IN; Atlanta, GA

Business Need:
- Intraday scheduling visibility
- Accurate forecasting and capacity planning
- Greater workforce management efficiency
- Flexible scheduling
- Rapidly increased occupancy
- Improved SLA adherence

Solutions:
- Workforce Management
- Quality Management
- Recording

The Impact:
- Lost-time savings of 10 FTE
- In-office savings of 13 FTE
- 0.4 FTE saved on time-off requests
- Interval volume forecast accuracy improved by 82%
- Required interval staffing forecast accuracy improved by 74%
- 82% occupancy threshold for SLA adherence

On The NICE Solution

"Once NICE training and reconfiguration were complete, and we were equipped to make data-driven WFM decisions, we saw an immediate improvement in service levels and savings."

- Lisa Cary, Manager of Capacity Planning & Strategy, CareSource

About CareSource

CareSource is a leading nonprofit managed healthcare company, based in Dayton, Ohio. Founded in 1989, the company administers one of the nation's largest Medicaid managed care plans and offers comprehensive health and life services. CareSource serves more than 1.8 million members in Ohio, Kentucky, Indiana, West Virginia and Georgia with a workforce of 2,900 people.

CareSource operates three contact centers, in: Dayton, Ohio; Indianapolis, Indiana; and Atlanta, Georgia. The centers employ 520 agents, who handle approximately 2.9 million interactions per year.

The Challenge

In 2017, CareSource was planning to launch new call centers in Indianapolis and Atlanta, to in-source contact center work previously handled by a vendor, and to establish a new internal call center in Dayton to handle calls from health partners. These developments would expand the company's geographic footprint and require an increase in staff from 196 contact center agents to 520.

While CareSource was using NICE Workforce Management (WFM) software, the company's Workforce Management team was unprepared to meet the demands of rapid growth and a multisite model. At the time, all contact center agents were being scheduled with the same management parameters, despite supporting different lines of business with different operating hours. Breaks and lunches were fixed across the board, and there was no visibility into interval staffing needs. As a result, for example, entire graduating training classes were assigned the same schedule, resulting in overstaffing in the evenings and understaffing at the beginning of the day.

Certain call types were left out of scheduling altogether, producing forecasts that were incomplete. Yet, these forecasts were maintained in Excel and used for capacity planning purposes.

Time off requests were completed by hand, using email and an Excel document. Getting a response normally took up to two business days.

There were daily meetings every day in order to discuss the previous day's service levels. Yet, adherence was infrequently monitored during intervals when service level agreements were in jeopardy.

Overall, staffing schedules were not optimized, which was going to pose an even greater risk to business success under the new expansion. Occupancy rates and schedule adherence needed to be increased, and shrinkage reduced. Such changes were expected to lead to a cultural shift in the CareSource call centers, which would require the support and trust of operations and senior leadership, internal partners, and front-office agents.

The Solution

CareSource contact center management determined that a more complete application of NICE Workforce Management would provide the efficiencies they urgently needed, as this comprehensive solution is designed to be scalable to any size operation. The team read the NICE WFM manual, discussed topics in the NICE User Group (NUG), and partnered with NICE WFM users at other local call centers. Ultimately, these efforts were not enough, nor were they cost-effective. So, CareSource decided that they needed focused expertise.

That meant engaging NICE Services for consulting and training, as well as for reconfiguring the NICE WFM software. The goal was to design a structure that would support multiskilled agents, multiple sites, different lines of business, and varying hours of operation. All these parameters and associated call types were built into NICE WFM, and staffing requirements began to be determined by intervals.

Rebuilding for Success

As part of the business expansion, two NICE consultants interviewed members of the CareSource contact center team about people, processes, and technology. They identified opportunities for improvement, and presented concrete and achievable goals. Then, a NICE representative spent three weeks training the CareSource team, refining the system redesign, and adjusting workforce management processes.

Lisa Cary, Manager of Capacity Planning and Strategy for CareSource, commented: "The team was fully engaged and benefitted greatly - our successes post-rebuild are all a result of the consultant's patience and expertise."

To ensure buy-in, considering the deep changes underway, CareSource contact center managers made sure to maintain ongoing communication at all levels. Agents were provided explanations regarding the reason behind the changes and common questions were answered, while the Human Resources department was engaged at all decision points. The contact center management team was also careful to err on the side of the agent whenever possible, which built trust and helped make the transition smoother.

CareSource is now able to focus more on forward-looking planning. Contact center staff hold weekly meetings on forecasting, shrinkage, upcoming activities, success stories, leadership concerns, and staff needs.

Measurable and Immediate Result

Now equipped to make data-driven decisions, the CareSource contact center management team accurately align staffing, lunches and breaks with call arrival patterns. They also give the newest advocates greater opportunities and motivation within the shift bidding process by incorporating performance into the previously tenure-only ranking system.

All agents have access to a calendar of availability and an automated time-off processing system that ensures instant approval or denial of requests. This has resulted in an immediate savings of three hours per day previously spent on manual processing, allowing analysts to focus instead on scheduling and real-time operations.

Intraday operations were incorporated into WFM planning, providing accurate visibility into the real-world, real-time results of forecasts and adherence monitoring. As with other NICE-driven optimizations, the results have been clear:

- Lost-time savings of 10 FTE
- In-office adherence increased by 4% (savings of 13 FTE)
- Call avoidance behaviors quickly identified through improved reporting

With the changes in shift alignment, time-off planning and intraday visibility, forecasts are accurate and reliable, driving all CareSource contact center staffing decisions:

- The mean absolute percentage error of volume forecasts dropped from 51.3% to 9.4%.
- The mean absolute percentage error of required staffing forecasts dropped from 44.8% to 11.8%.

There was an associated immediate improvement in service levels when the NICE WFM optimization adjustments went live, due the capability to operate effectively at a higher occupancy (82% occupancy threshold, compared to 70% previously).

Plans to Leverage More of NICE WFM

By leveraging NICE WFM, CareSource has improved employee performance and engagement, as well as cultivated a partnership between leadership and the WFM team.

With this across-the-board support, CareSource will soon be integrating additional NICE WFM capabilities into its contact centers. These include voluntary time-off, further improvements in schedule change policies, "what-if" intraday analytics, average handle time reporting, and much more.