



Case Study

Conducting a Planning Assessment

Company profile

Health insurance company in Louisiana, a leader in delivering innovative health care products, servicing more than 1.3 million members including Medicare and Medicaid members. The company offers its members discounts and information on a wide variety of health-related services at no additional cost.

Client Business Challenge

On the tactical side, a key objective is to replace a care management package as it is being unsupported by the vendor. On the strategic side, the objectives are around establishing an enterprise platform for analytic data and analytic reporting as well as creating and enhancing business capabilities for the 'provider' and 'health management' businesses.

The following outline represents the key IT and business drivers acting as the focal points of the planning assessment:

- A. **Tactical Drivers** – *i.e., the following are required in order to support the business:*
 - Replacement of Care Management Software Package
 - Healthcare Reform (HCR) Reporting
- B. **Enterprise Analytic Environment** – *i.e., focusing on the data integration layers as well as analytic reporting with concentration of:*
 - Analytic Architecture
 - Technical Evaluation of the Analytic Platform
- C. **High-level Business Drivers** – *i.e., the following business functions are targeted as key areas to enhance analytic reporting capabilities:*
 - Provider Profiling
 - Reimbursement Reform
 - Health Management Opportunity
 - Consumer Transparency

Client Environment

Client has a mixture of technologies including IBM-DB2, SQL Server, & Sybase supporting transactional systems (such as Facets) as well as analytic applications (mostly 3rd party products). Current ETL tool is MS-SSIS, but moving to an Informatica platform in 2011. They have Business Objects (BOE), but being used for a small percentage of analytic reporting needs. MS Access is the most significantly used reporting tool as well as base SAS for a selected group. It's fair to say that most of their analytic reporting is ad-hoc.

Two major initiatives that impact their current environment: 1) an existing care management software package (will not be supported in 2012) that provides 80% of the data used for analytical purposes downstream; and 2) an existing employer reporting application that is not satisfying the needs of the large group reporting.

Solution

An 8-week planning assessment was conducted over an 11-week period (due to holidays) identifying the development and execution approach to build an Enterprise Analytic Environment. Over 40 extensive business (22) and IT (20) interviews were conducted creating a complete business requirements document related to the business needs.

As a result of executing this planning assessment, the following project deliverables were produced for this client:

- A. **Business Requirements Document (BRD)** – *key business drivers and requirements based IT and business interviews with:*
 1. **Vision Statement** – high-level statement describing the analytic vision of the client
 2. **Business Drivers** – high-level summaries of each key driver – i.e., highlighting tactical and strategic
 3. **Business Requirements** – represent specific needs of each business driver with detail clarity and will act as input to the analysis phases of a project

- B. **High-level Architecture** – *first iteration of the analytic reference architecture blueprint based on the Healthcare Analytic Accelerators – this document will be divided into two states:*
 1. **Current state architecture** – highlighting strengths and gaps based on the current environment
 2. **Future state architecture** – highlighting IT and business solutions that address the stated business drivers
 - a) Analytic architecture framework
 - b) Recommended high-level reporting and business capabilities
 - c) Technical Evaluation of the Analytic Platform (e.g., a tool inventory)

- C. **Analytic Roadmap** – *a complete analytic program plan (roadmap) outlining the sequence of projects and illustrating the foundational components including:*
 1. Implementation Strategy
 - a) 2-year time-line (chart)
 - b) Sequence of projects (activities) and key milestones
 2. Analytics Vision – i.e., *Data Governance, & Business Drivers*
 3. Analytics Architecture – i.e., *Data Models, ETL Architecture, & QA*
 4. Technical Infrastructure – i.e., *Tools Platform, Vendors, & Metadata*
 5. Development Approach/Methodology – i.e., *Best Practices & Guiding Principles*
 6. Resource Model – i.e., *Projected IT teams necessary to support new environment*

Benefit Realization

The planning effort provided this client with a complete program plan for the build-out of an Enterprise Analytics platform including a roadmap to deploy analytics both internal and external. Subsequently, the executive management team used a significant portion of these deliverables to support an RFP initiative seeking 3rd party vendor help in building their Enterprise Analytics and Reporting Platform.

Technologies and Services Utilized

- MS PowerPoint and Word, ERWin (Data Modeling)
- Three person team: PM/Solutions Architect, Business SME, & Business Analyst