



CASE STUDY

A Portal of Opportunity

A Call Center Reset Streamlines Patient Admission, Reduces Call Center Disorder

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Customer call center services are a highly specialized and essential piece of any successful healthcare recovery center's support model. When a person or a loved one reaches out to a recovery center looking for help for an addiction related issue, the call center agent is the all-important first contact.

Unfortunately, the pre-admission process to get that potential patient the help they need can also act as a deterrent for many recovery centers. The process necessarily includes basic patient information as well as a detailed medical background and current condition, insurance coverage, etc., in order for that individual to qualify. Take too much time, and the person will likely give up—and the opportunity to help that person is lost. Further complicating the process, a majority of patients return multiple times, so making sure the patient experience is efficient and consistent from the very first phone call through facility admission and then obviously during their stay at the facility as well.

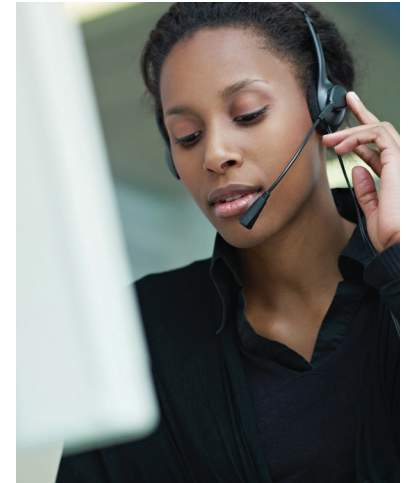
The success of any recovery center support model is built on speed and accuracy. The agents need intuitive workflows, a user interface (UI) and user experience (UX) that enables them to capture information and match the patient needs to the right facility quickly. It is a difficult job made even more complex when call center agents have to move between multiple systems. One call could take an hour or more.

Too often, UI/UX is an afterthought in the midst of rapid growth. And while Salesforce is a popular choice for foundational solutions, many companies bolt on solutions to solve custom needs—and the challenge grows.

For one healthcare recovery center, system complexity and bolted on solutions combined with rapid growth created an untenable situation that the leadership wanted to solve. After a complete detailed assessment and the development of a strategic roadmap by the DecisivEdge team, the answer was to build better data bridges using an innovative case stage gate approach.

The Process: Cleanse and Reconnect

One of the key roadmap objectives was to improve existing operational efficiency. Call center agents indicated that they wanted a more



Speed, efficiency and consistency are all important components of a successful pre-admission process. To achieve maximum speed and accuracy, call center agents in a well-thought out and intuitive work flow, UI and UX.

Benefits Include:

- More accurate response
- Faster response time
- Consistent patient experience
- Intuitive workflow for agents
- Agents spend more time with patients for a higher quality interaction

DecisivEdge Solution:

- Works within Salesforce
- Customizable for unique business models
- Streamlines UI

intuitive, semi-automated system to better respond to both new and returning patients.

As a first step, DecisivEdge team focused on the call center interface, with an eye to eliminating unused fields and duplicate entries in the Primary Service Console. The team closely evaluated fields that were used and not used. Then, they arranged those options based on frequency of use and logical groupings.

For example, many patient data points (over 200 fields) were captured on the Salesforce Case Object page layout. This required the call center agent to scroll up and down the page when talking to the patient, even when a vast majority of fields were left blank. The DecisivEdge team identified over 30 unused fields and removed them from the page layout. Then using an average call as a template, the team rearranged the remaining fields and grouped them appropriately.

The effect of these changes were immediately noticeable by the call center agents and as a result, the quality of the calls increased because agents spent less time searching and scrolling, and more time focusing on the patient.

Reconfigure, Reconnect

Once familiar with the system and the call center agent's preferred workflow, the DecisivEdge team began a system redesign that focused on a stage gate or phased task-based approach to building an intuitive UI/UX patient-to-agent conversation. It is an automated data collection and attribution that moves from point of contact to admission that drives improved call center agent workflows.

The key phases are insurance, assessment, financial, scheduling/transport and admittance. The emphasis was to ensure that the call center agent has the flexibility to transition quickly from one task to another while maintaining visibility to open areas, fall outs, and next steps to complete an admission.

Underscoring the design are rules- and logic-based notifications that are based on data collected at each stage gate. For instance, a new open case is automatically designated Not Viable until either stage gate 1 (insurance) or stage gate 2 (assessment) are confirmed. As well, the treatment advisor has the ability to manually declare a case viable for any situations that require override of the defined logic.



The DecisivEdge team evaluated and tested the user interface to determine redundancies and inefficiencies. Once the UI was revised, the quality of calls increased immediately.

A few additional agent-focused capabilities include:

- **Salesforce-EHR Interface:** The new interactive call flow customer experience user interface for advisors makes data entry more intuitive and follows the direction of the call processing. For instance, they improved the integration from Salesforce to Avatar, the electronic health record (EHR) system, as a first step. The team analyzed and eliminated various known interface errors between the EHR and Salesforce environment using Boomi cloud-based enterprise integration Platform as a Service (iPaaS).
- **Patient Financial Calculator:** To streamline the patient approval process, the team established a patient financial calculator that directly integrated the Service Console within Salesforce—a workflow that previously required a third party transition.
- **Patient Benefits History:** For verification of benefits, the team established logical criteria using Salesforce user interface applications to facilitate quick case creation with patient benefits history automatically included.

The Result: Actionable Intel

No software improvement is effective without some way to verify that the software is working to the user needs. A key component of the optimized UI/UX solution was to establish a clear development, testing and production landscape for feature set development.

The team focused on two key areas:

- **Reporting Insights:** Restructured current reporting methods so that the healthcare provider could identify loopholes and perform fixes on existing dashboard reports.
- **Future Proofing:** With the expected end-of-life for Salesforce Process Builder, established progressive migration of existing process actions from Process Builder to Flows and APEX Triggers (workflow automation)

The improvements in the call center workflow have been impressive. More streamlined workflows and better data connections have not only helped active call agents, but also in the training of new call agents.

Further, the redesigned system now supports marketing and business development. It includes a dashboard to support business development activities within the Salesforce Reporting feature and help the marketing team understand the types of patients that are entering the system



in order to build facility standing and invest monies appropriately. The redesigned system further supports predictive analytics and the integration of third-party services such as Esri and Definitive Healthcare. As the healthcare recovery center has expanded from a handful of call center agents to more than a dozen, the trainers have been able to shorten the time it takes to get agents up to speed. CRM / system training went down from 40 hours to 8 hours or -80% reduction in training time! Also, the time to complete pre-admission forms has been reduced by 33%.

Quantifiable results...

80%

Reduction in training time

33%

Reduction in time to complete pre-admission forms



About DecisivEdge

We engineer best-in-class technology solutions.

DecisivEdge is a global business consulting and technology services firm focused on creating a sustainable competitive edge through digital transformations. We help our clients elevate their operational capabilities and seize their market opportunity by leveraging and optimizing best-in-class technology solutions in conjunction with detailed analytics and data-driven operational strategies.

We are knowledge leaders with deep industry knowledge.

Our clients benefit from our unique ideas, knowledge of industry best practices, and our ability to develop creative solutions to overcome their highest priority business and technology challenges. Our collaborative approach is designed to really understand our clients' business objectives, and then deploy a seasoned solution delivery team to get the job done right the first time.

About Salesforce

Salesforce is one of the world's leading CRM systems, engineered to help manage interactions and information about customers and patients across the entire life cycle.

Because Salesforce is such a widely-used CRM, the DecisivEdge team makes it a priority to understand and integrate with the software, allowing the organization to continue operations with little or no downtime.



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