Health Solutions Provider Improves Operational Processes in Portfolio Management

Overview

Country of Origin: United States
Industry: Health Care

Client Profile
Supports commercial, individual, and government-sponsored health plans, health insurance marketplaces, and healthcare providers.

Business Situation
The health care clients' management wanted to ease the decision making process and improve multiple portfolio management areas.

Solution
DeltaBahn developed custom tools, macros and reports to solve the needs.

The health solution provider supports commercial, individual, and government-sponsored health plans, health insurance marketplaces, and healthcare providers. Its' services and solutions include enterprise payer platforms, population health management analytics, care management, and business process outsourcing solutions, each designed to assist a company manage the processes, information, and products that directly impact quality outcomes.

The client wanted to improve the resource availabilities' visibility of their 2000+ employees/contractors that work on 3000+ projects. With this data, management could make better informed decisions on the projects that need staff in the future and, ultimately, provide insight into when to hire more resources to accomplish their goals. The client also wanted to base its' decisions on what projects were generating the most revenue based on their complex professional services billing model.

DeltaBahn worked closely with the client in order to implement Microsoft Project Online into business. The client was already using Microsoft Project 2010 to manage their projects, so this made the transition easier, but the solution in place did not utilize a centralized database, actual work had to be manually entered from an external system (Clarity) into individual project plans and there was no meaningful revenue data associated with the project plans to close the gap between the accounting system and the project schedules.

Challenges

- The client currently uses Clarity for their timesheet entry. Double entry into both Clarity and Microsoft Project Online was not a viable solution.
- The client bills its' clients according to the resource roles and negotiated rates on a per project basis. This means that the same resource could have a different billing rate on two different projects. To add to the complexity, the billing rates of the resource roles could change over time on a long running project. Also, some projects are Fix Bid, which results in bypassing the idea of an individual billing rate, at any level.
- The client requires portfolio reports that surface detail monthly data at the resource level for every project. Hours for each resource on projects they are assigned to, past and future projects, along with their upcoming availability and project demand are features of Project Online. However, the client needed this information by departments that resources belong to. Out-of-the-box do not serve this purpose. Furthermore, with over 2000 resources and 3000 projects, the data set is in the several millions of records and a simple Excel to OData reporting solution would not perform very well

Solution

- DeltaBahn developed a custom import tool that read the feed of Actual Hours entered into the Clarity system for all 2000+ resources and applied them to the 3000+ projects that they were assigned to. The import tool was configured to run on a dedicated internal server and used Project Online API's in order to submit project status updates to each of the schedules in order to avoid the double entry challenge.
- DeltaBahn developed a custom VBA Macro that calculated the revenue of a project based on resource roles rates specified via Enterprise Custom Fields (EFCs) at the project level. The VBA Macro also took into consideration to multiply rate card periods which allowed the Project Managers to specify a different set of rates to handle changes on a long running project. In addition, the VBA Macro also allows to specify a Fix Bid project type that calculates revenue based on a fixed price specified on milestone tasks within the schedule.
- DeltaBahn developed 15+ reports with Excel Online utilizing Pivot Tables to surface resource hours, availability and revenue across every project in the portfolio. Because of the large amount of data, the solution involved implementing an AzureVM with SQL Server and developing several SSIS packages to read OData from Project Online on a continual basis. Using the power of SQL Stored procedures to aggregate the data, the reports performed well enough to meet the the clients' needs.