

ABOUT HEALTHSYSTEMS

Healthsystems manages the cost and utilization of pharmacy and ancillary medical benefits for workers' compensation insurance payers and ensures that injured worker patients receive the most appropriate care and treatment. Their primary services include pharmacy benefit management, clinical review services and ancillary benefits management. Healthsystems relies on MicroStrategy technology for enterprise reporting. While MicroStrategy was solving their operational needs, there was a desire to bring in a tool that better equipped the business with governed self-service reporting capabilities.



HEALTHSYSTEMS INCREASES SALES CONVERSIONS THROUGH POWER BI DASHBOARD

CHALLENGE

CCG worked with the Healthsystems Data Analytics Leadership to identify the line of business that would benefit most from a functional self-service proof of concept. The sales department at Healthsystems is a data savvy team with extensive analytics needs for internal and externally facing reports, which made them an excellent candidate to test drive Power BI.

An important prospecting tool for members of the sales team is a customized comparison tool, which allows them to help prospects identify key areas of spend and opportunities for cost reduction early in the sales cycle. The production of this comparison tool is a time-consuming process that monopolizes much of the sales team's resources. The comparison tool is a lengthy report containing charts and insights generated by the sales team and presented to prospects via PowerPoint screenshots. The report relies on a standard template which the prospect uses to provide a sample data set to Healthsystems. This data set is then cleansed and prepared by a single sales analyst for reporting. While the data is delivered in a standard template, the previous method for performing ETL did not allow for a repeatable process, which contributed to much of the time constraints on the sales team. Much of the work that goes into these reports often goes unknown to the prospect and is sometimes undervalued due to the simplified nature of communicating the results in static screenshots. Healthsystems and CCG saw an opportunity to simplify the development of these comparison tool reports and improve up on the method in which results are delivered to prospects.

SOLUTION

Healthsystems provided CCG with a sample data set to perform this proof of concept. CCG pulled the raw source file into Power BI and began manipulating the data within the tool. By performing the data wrangling and cleansing inside of Power BI, CCG could create a plug-and-play repeatable process that would allow sales to simply swap out future data sets and refresh the dashboard instead of performing ETL. Once the data was loaded into Power BI, CCG visualized the data in an eye-catching dashboard that better highlighted opportunities for the prospect. This dashboard prototype became the new, more modern comparison tool for the sales department. While the new dashboard was visually more appealing and saved the sales team valuable time in preparing, CCG still wanted to improve the delivery functionality of the comparison tool, enabling the sales team to easily show the live dashboard to prospects instead of static screenshots. CCG leveraged the relationship between Power BI and PowerPoint – both of which are part of the Microsoft Office 365 family of products – to build a connection between the two programs, embedding the Power BI dashboards as objects directly

in PowerPoint. This allowed the sales team to share live dashboards with prospective clients, empowering them with real-time drill down capabilities and functioning data sets to clearly communicate results. CCG worked closely with the sales team throughout the dashboard development process, designing and deploying the application in an agile fashion to guarantee utility of the final solution. The newly developed Power BI comparison dashboard tool drastically reduces the time spent preparing reports for prospects and improves the delivery method of results to the prospect, which allows the sales team to focus on what Healthsystems does best – creating relationships with organizations to help them provide the best affordable care for their employees. Since the inception of this project, Healthsystems has seen an overall increase in sales conversions and increased activity in the sales pipeline. The success of this project helped to springboard support for future Power BI engagements, which is now being rolled out to additional lines of business within the organization who can benefit from self-service analytics.