Analytics-based reporting solution takes the fast track to deployment

Blue Health Intelligence® (BHI®) and Blue Cross Blue Shield of Michigan collaborate to create entirely new system of automated, customized reports for agents, brokers, and consultants.

In brief

Undeterred by a tight development schedule, complex user needs, and a pandemic that brought shutdowns and remote work, Blue Cross Blue Shield of Michigan and BHI's Whyzen™ Analytics team successfully replaced a legacy data reporting platform for Blue Cross' agents, brokers and consultants in just four months. The new analytics-driven solution, Scheduler for Agent Reporting, or SAR, benefited from the flexibility and adaptability of the Whyzen platform, the expertise of the implementation team, and a strong and established collaboration between the two organizations.

Background

In February 2020, Blue Cross Blue Shield of Michigan approached BHI with an urgent need: Blue Cross' legacy tool for creating, compiling and producing report data for brokers, benefits consultants, and insurance agents needed to be replaced. Called Blue Direct Reporting, or BDR, it had been used for more than 20 years for reporting and financial applications – an eternity in the software world. Blue Cross had been trying for eight years, without success, to replace it. Given the number and types of reports that had to go out at regularly scheduled intervals, it was a project of central importance.

"This reporting is for the small to mid-sized employers, which is our bread and butter," said Rabia Sultana, Blue Cross manager for Whyzen Analytics and Report Development. Sultana led this transition. "Our group customers need reporting on which they can base benefit decisions on a month-to-month basis. Not only do we provide a monthly snapshot of their data, but we have a renewal month option providing crucial information on the types of packages agents will need to provide, which in turn, helps the sales team at Blue Cross understand what clients need."

Within weeks, of course, the nation was largely shut down by COVID-19. All meetings, design, and engineering work had to be done remotely. While a new experience for everyone, it was especially stressful in the early stages of such a complex data integration project.

"We had no choice but to get this done, but there were big challenges in workflow – learning how to work via video conferencing – plus cracking the source code for the old software and figuring out the parameters of reporting," said Mary Henderson, BHI's senior vice president of Product Management and Business Innovation. "With our deadline, there were a lot of late nights, but people on both teams had worked together for years on the development of Whyzen Analytics and subsequent refinements. (Blue Cross) knew us and our capabilities, and we knew theirs."

Challenge

The SAR project was not a rebuild of an existing system, but a reimagining of the entire reporting and output processes for both the Blue Cross and its owned subsidiary, Blue Care Network, Michigan's largest HMO with access providers in all counties.

Given the age of the legacy BDR system, the engineers who built it were long gone from Blue Cross. There was no documentation of system requirements, and the source code was unknown. "The previous tool was a bit of a black box," said Kevin O'Mara, vice president of Product Management, who led the BHI product team assigned to the SAR project. "We had to reverse engineer the old system and build in parameters that we weren't even thinking about when we began." Those included renewal periods for each account, underwriting reports, member utilization, pharmacy carveouts, and agent of record changes.

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RABIA SULTANA, BLUE CROSS MANAGER FOR WHYZEN™ ANALYTICS AND REPORT DEVELOPMENT

Producing highly customized reports
The flexibility and scalability of Whyzen Analytics were critical in helping Blue Cross leadership meet the unique reporting needs of their clients.

Collaborating on the most efficient solutions
A strong working relationship allowed Blue Cross and BHI to successfully navigate remote working challenges presented by COVID-19.

Drawing on deep industry knowledge
BHI's technical expertise and consultative approach with Blue Cross enabled the rapid implementation of this essential capability.

"This wasn't just a software project accomplished in four months, but more like detective work followed by a new program," Sultana added.

Blue Cross leadership declared the project an "all-hands-on-deck" effort, bringing in underwriting, IT, business readiness, sales, finance, and Blue Cross' Whyzen Analytics team to the table. It was a project that would easily have taken a year and a half to complete, replete with numerous airline flights for in-person meetings, were it not for COVID-19 and the urgency of the need to retire the BDR, she said.

There was also the issue of how the data was presented in the monthly reports; custom templates had to be incorporated for each account. Most importantly, the new system had to bring leading-edge analytics and reporting to Blue Cross' clients and their stakeholders.

Solution

SAR was integrated into BHI's state-of-the-art Whyzen Analytics reporting solution. The platform uses an advanced associative data model and embedded artificial intelligence, including machine learning, to be more accurate and actionable over time. Its flexible and customizable infrastructure and reporting capabilities made it an ideal host for the reporting solution.

For agents and brokers, collecting large amounts of statistics and numbers on a sales cycle won't matter if there is no layer of added intelligence pointing to actions they can take immediately to improve.

The teams were aided by the fact that Whyzen Analytics could customize and automate standard reporting.

Features include:

- Integrated, real-time, on-demand data sources
- Rapid turnaround of data updates
- User ability to design their own report templates
- Self-service, parameterized scheduling of reports

Results

Work began on the new SAR in late April and it was completed and rolled out four months later, within the ambitious timeframe specified in the contract.

"Through its capabilities and nimbleness, BHI was a great collaborator in bringing this project in on time and as requested, without any disruptions to the client," Sultana said.

Whyzen Analytics was a natural solution for Blue Cross, she said. "For the past two years, we have been working diligently to centralize any kind of reporting we do through the Whyzen platform. We knew its capabilities. In this process, we retired a lot of reports and amended the rest, providing 17 higher quality, almost brand-new reports."

Conclusion

Due to the nature of Whyzen Analytics and the customization of SAR, it is now available to other Whyzen Analytics customers for any of their standard reporting needs.

"Because of the timeframe and the complexity of the project, this was not only one of the most challenging but also rewarding projects I have worked on in a long career," Henderson said. "These teams always figure out what to do and the best way to do it."