Case Management Improves Service Management Across the Enterprise and Enables Customer Service Satisfaction

Quick Stats

- Leading provider of pharmacy benefit management services and healthcare information technology solutions
- Over 25,000 customer cases logged each month
- Existing case management tool relied exclusively on the knowledge of case workers to accurately create and manually assign work
- 18 month project delivered in only 7 months
- Workflow automation and self-service improved the efficiency and accuracy of case management process

Exec Summary:
Catamaran has long held true to a vision of extending service management capabilities rooted in IT to other areas across the enterprise as a means to improve efficiency and customer experiences. Based on the company’s success with ServiceNow for IT service management, it became the obvious platform on which to extend automation across the business. As a first step, Catamaran leveraged the platform’s workflow automation, self-service, request management and service catalog capabilities to develop a custom case management application. This new application replaced a legacy CRM application and automates request management and fulfillment for both internal and external customers. To date, the case management solution has drastically improved the efficiency and accuracy with which Catamaran handles customer requests thanks to workflows that can automatically generate all qualifying tasks based on the case submitted.

Company Overview:
Catamaran is a leading provider of pharmacy benefit management (“PBM”) services and healthcare information technology (“HCIT”) solutions to the healthcare benefit management industry.

This was a win for Catamaran, Fruition Partners and ServiceNow.

Jim Park
Vice President of Corporate Systems
Catamaran
Catamaran’s product offerings and solutions combine a wide range of applications and PBM services designed to assist its customers in reducing the cost and managing the complexity of their prescription drug programs. Catamaran’s customers include many of the largest organizations in the pharmaceutical supply chain, such as pharmacy benefit managers, managed care organizations, self-insured employer groups, unions, third-party health care plan administrators, and state and federal government entities.

**Challenge:**

On a regular basis, Catamaran receives hundreds of customer requests to update pharmacy benefits, prescription plans, and formularies. Managing and fulfilling these requests in a timely and accurate manner is critical to Catamaran’s success. It’s no surprise, then, that Catamaran was skeptical about the sustainability of their existing case management tool, Siebel, which relied exclusively on the knowledge of case workers to accurately create and manually assign the work.

The risks associated with manually-driven processes made the decision to automate case management a no-brainer. But Catamaran was focused on improving service management across the enterprise and wanted to identify a solution that could be applied to automating processes and work tasks in other operational areas. Having already experienced the ITSM benefits of the ServiceNow platform following their phase 1 implementation, Catamaran was confident that ServiceNow was the right choice due, in large part, to its rapid development cycles, cost feasibility, and workflow automation capabilities. Consideration was given to the existing Salesforce.com application; but even its CRM functionality and convenience as an existing Catamaran platform were not enough to overrule the significant benefits ServiceNow offered.

With the decision to leverage ServiceNow for case management made, Catamaran brought in Fruition Partners’ architect, design, and development experts to help meet their project specifications, which essentially boiled down to three primary requirements:

1. **Accelerated Implementation** - Catamaran drew up an aggressive project roadmap that called for a new case management solution to be delivered in only 7 months to ensure they were prepared for new customer rollout on January 1, 2015.

2. **Data Security** - Thousands of external customers needed to log into the shared ServiceNow application to manage their requests, so it was important to keep company data segregated.

3. **Workflow Automation** - With legacy Siebel tool being very manual intensive and cumbersome to use, Catamaran needed to improve usability, accuracy of case assignments, and accelerate service request fulfillment.

In looking at the business requirements and expected level of customization, the case management project was estimated to take 18 months; yet, iterative development cycles enabled by ServiceNow along with Fruition Partners’ platform expertise made it possible to shrink the implementation timeline by 11 months. With a target completion date established, it was time to start building Catamaran’s case management solution.

**Solution:**

Catamaran looked to the custom case management application to become a model for automating service delivery in other areas. Although the project’s custom data security and workflows were unique to case management, Catamaran felt the underlying automation and self-service capabilities could easily be applied to other areas in the near future. So, it was important for the case management solution to demonstrate how the platform could be utilized to enable different business applications while aligning to service management best practices.

With a projected volume of over 25,000 cases logged each month through the case management tool, data separation and access needed to be addressed. Fruition Partners’ Senior Technical Consultant developed highly customized ACLs, scripts, and business rules to ensure proper access and data separation based on persona. Together with SSO authentication, external customers are now able to securely submit cases directly through the self-service interface simply by clicking a link via Catamaran’s existing Customer Information Center (CIC).
To ensure proper workflow and auto-assignment of tasks for its internal case workers, Fruition Partners leveraged the Task Creation Wizard within ServiceNow to collect categorization details to determine which form to present and how to route for completion via workflow. To further upgrade the user experience, Fruition Partners also built out the following enhancements:

**Custom Email Functionality**

Text/Dropdown filters to select Users by Workgroup and Customers by Account

- Custom form to add additional fields To/Cc/Bcc
- Email Templates to include consistent content
- Custom processor to enable added functionality

**Custom Templates for Customer Implementations**

- Created custom templating functionality to allow admins to define repeatable processes used for implementing new plans for a customer

**Custom Issue and Response Tracking**

- Key customer transaction notification
- Go live support and prioritization for Client support and resolution
- Reporting and Metric classification

According to Deb Beamish, Sr. IT Business Systems Analyst at Catamaran, “Fruition Partners’ technical team did a great job to implement significant functionality in a short time frame with minimal issues.”

**Outcome:**

To date, the case management solution has drastically improved the efficiency and accuracy with which Catamaran handles customer requests thanks to workflows that can automatically generate all qualifying tasks based on the case submitted. As a result, case workers are able to provide better case management support and focus on more complicated case management tasks.

It’s obvious that the internal case workers have experienced the most immediate impact now that they have a simplified, yet structured means of fulfilling requests. Take a step back, though, and, it’s apparent that Catamaran as a whole is the biggest winner. Not only has workflow automation allowed Catamaran to take on more customers, but it has also affirmed their commitment to improving customer support by extending service management capabilities across the enterprise. Fortunately for Catamaran management, this commitment is shared across the organization, as more teams are identifying opportunities to improve service delivery and automate processes leveraging ServiceNow because they see what can be done and how quickly it can be done.

Jim Park, Vice President of Corporate Systems at Catamaran, said it best when asked what he was most proud of: “The quality of how the implementation went. I expected more issues because we did it so quickly. Extending our success with ServiceNow through this new application is driving demand even higher to bring similar workflow solutions to other business areas and opening up new conversations for us to streamline the way other groups conduct their work. This was a win for Catamaran, Fruition Partners and ServiceNow.”

**Further Information**

Read more case studies in the resource section of our website: fruitionpartners.com