INSIGHTOUT™

Company

US-based leading provider of physician services with $15B in annual revenue

Industry

Healthcare

Data Sources

80+ Excel spreadsheets
3 recruiting management platforms
2 time tracking systems
Payroll system

5x

Workflow efficiencies realized through automation

180

Estimated hours saved monthly across the organization

$3M

Worth of incentive payments processed to date

Turning Bottlenecks into **Growth** with InsightOut

How one of the nation's leading healthcare companies was able to accelerate critical physician placements through data integration and workflow automation

In the summer of 2019, Treehouse Technology Group partnered with a leading nationwide provider of physician services, post-acute care, and ambulatory surgery services. Its clinical solutions division specifically works to improve healthcare quality and patient outcomes while enhancing operational efficiency and managing cost. They are able to do this in large part through recruiting high-quality physicians and medical professionals to hospitals around the country.

The company approached Treehouse Technology Group with the goal of streamlining its incentives management and payment process across all levels of the organization. With various ladders of incentives for the placement of different medical professionals, the client was looking to improve and automate its workflow process for recruiters, directors, managers, and Regional Service Center (RSC) leaders.

By January of 2020, Treehouse Technology Group delivered a centralized data management framework with the InsightOut platform that simplified the submission and approval of incentives within the company's hierarchy, allowing recruiters and management to easily view and analyze their incentive payments.

Customer Challenges

The company was managing incentive payments for recruiters and management in over 80 Excel spreadsheets, relying on the manual input of information which was difficult to track, verify, and analyze. This highly manual process was not only inefficient and time-consuming, but was growing in complexity, creating scalability challenges across the organization.

Challenge 1 The company was handling the approval of incentives via email across all levels of the organization, from recruiters and directors to managers and RSC leaders. With a highly manual process in place, they lacked the standardization necessary for effective company-wide management.

Challenge 2 The company had difficulty analyzing how much they were paying in incentives, or where and to whom incentives were going, relying largely on an untenable honor system for submissions. Furthermore, they had no ability to measure and ensure that incentives were aligning with recruiter, director, and manager performance.

Challenge 3 It was difficult for the company to handle one-off incentive scenarios. For instance, if a placement needed to be split between two recruiters. Or, if a placement was supposed to be paid in a different way than the standard payment, it wasn't clear what was required for submission approval.

Challenge 4 Incentive submissions to payroll were piecemeal and haphazard, lacking consistency and timeliness. Without an automated process in place, some recruiters waited months before submitting their spreadsheets for approval and payment.
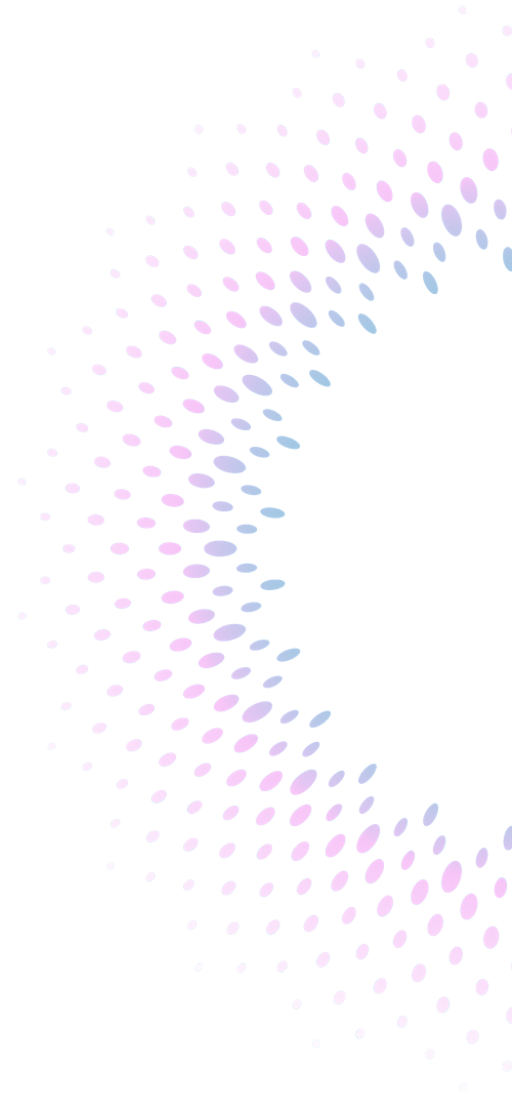
The InsightOut Solution

Treehouse Technology Group took a multi-phased approach to addressing the company's needs, implementing a customized instance of InsightOut. TTG's team of high-level engineers spent a considerable amount of time assessing the company's existing workflow in order to automate it and incorporate disparate elements within InsightOut's scalable data management framework, which is supported by:

A. Standardized metrics and organizational taxonomy. This provides a common language that eliminates the discrepancies in terminology arising from the manual input of information. All business users are guided by a unified set of metrics and definitions.

B. Clear governance and role permissioning. This allows a flexible and secure way of providing select groups of users with access to certain data, based on the organization's hierarchy. For instance, while directors and managers required access to all recruiter information, individual recruiters would only be allowed access to their own data.

Through aggregating the company's data sources, defining clear recruitment metrics, and mapping the stakeholder roles and access requirements, TTG was able to deliver InsightOut's self-service data experience to users across the organization.

Phase 1 TTG began with a deep dive into the company's current process for submitting, managing and approving incentives. They solicited input and gathered requirements for developing a new process from a general working group, including the SVP of Recruiting, Director of Recruiting, RSC leaders, and recruiters.

Phase 2 TTG initiated a data aggregation process within the company's internal systems. This included three disparate types of homegrown data sources, as well as a standard Excel source. The data was prepared and validated through InsightOut's custom mapping and rules-based aggregation engine.

Phase 3 TTG modeled the company's aggregated data within InsightOut's data management layer, which enabled the automation of incentive calculations and tiering, historical reporting, and yearly forecasting to give the leadership insight into the reporting and planning that they required.

Phase 4 TTG optimized InsightOut's front-end dashboard and reporting interface for recruiters, directors, managers, and RSC leaders to view, submit, and analyze their incentives in a streamlined fashion.

> " The amount of time it takes a recruiter to review the incentive tool and approve their commissions is a lot faster than the old Excel documents that we used to use. "
>
> - Recruiting Manager

Results

Treehouse Technology Group successfully took the company from a manual, time-consuming approval process to an automated, standardized system that allows 70+ users to easily view, manage, submit, and approve their incentives.

Recruiters can simply log in to the tool to verify their payments and make any necessary adjustments before submitting for monthly approval. Directors and managers are notified of submissions via email and are able to review and approve the items in their queue, as well as submit their own quarterly incentives directly in the platform. Additionally, managers can build comprehensive quarterly and annual reporting within the unified interface as enabled by InsightOut's data modeling, direct source system connections, and real-time insight delivery.

While previously it took recruiters roughly 3-4 hours each to individually reconcile end of month incentives, this same process now takes between 30 to 60 minutes with InsightOut.

Accordingly, there are fewer instances of users needing to manually input data. With a 75% automation of incentives calculations, recruiters, directors, and managers are having to make fewer changes. While the ability to drill down and make even row-level adjustments in the data source is built-in, the time and effort required to do so has been significantly reduced.

InsightOut has also expedited payroll by automating the approval process across the organization, leading to greater regulation and consistency.

Furthermore, while even routine data analysis were a challenge previously, InsightOut has provided much needed insight into trend lines for the amount spent on incentives and the total hires netted. Management now has a comprehensive view of performance across the organization, allowing them to conduct more accurate reporting and in-depth analysis and identify trends and risk areas for cost and resource optimization.

Key Results

Complete workflow overhaul with **75% full automation** of incentives calculations, working toward 95% as the platform gathers historical data

Standardized and streamlined process for incentives submission and approval **less prone to human error**

Seamless **processing of ~1400 placements** (physician and APPs) **worth over $3 million in incentives**

Saves ~120 hours per month (2-3 hours per month per recruiter) in addition to **60 hours per month for management**

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Future Outlook

While the focus of the project was to streamline the submission and approval of incentives across the organization, the company can works towards incorporating more business planning insights through InsightOut, with native forecasting and scenario modeling capabilities. For instance, managers could analyze incentive trends (e.g. spending vs. hires), create projections (e.g. paying X number of incentives out to recruiters yearly), better assess recruiter performance, or plan future outlooks and more nimbly adjust quotas if faced with a downturn — ultimately leading to better risk mitigation and resource planning. By leveraging InsightOut's data capabilities, where leaders and teams can extract actionable insights from recruitment data and beyond, the company is better equipped to make sound and confident business decisions.

See how you can do more with your data

Take your business farther with in-depth data
analysis and actionable insights with **InsightOut**

Schedule a custom demo here

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