



# CASE STUDY

## Providing Training Solutions at a Major Insurance Company



### SITUATION

*A major healthcare insurer was completing multiple projects to prepare their workforce for new processes affecting healthcare, to improve efficiencies, and to lower administrative costs, all of which would majorly impact their employees. As a result, the company determined that their current system (MaxMC) needed to be upgraded to comply with the new policies and procedures.*

### The Challenge

To comply with the new healthcare policies, the organization decided to implement a collaborative care management platform. The vision for this care management system was to help complex health plans integrate both internal and external data components and connect the entire healthcare team. The goal of implementing this new cloud-based solution was to improve the healthcare preapproval process, care management for higher-risk customers, and management of claims appeals. Hundreds of employees, both clinical and non-clinical, required training for this new platform. Vital to the success of the initiative, the organization sought out an innovative partner to develop their care management legacy system training to align with their goals and strategic vision. GP Strategies® was chosen to create a training development plan that teaches critical job skills, addresses issues with the development and configuration of the organization's care management system, and uses subject matter expertise from the business. For full flexibility in adapting to the development cycle of the care management system, the Successive Approximation Model (SAM) was selected for training development.



## GP Strategies Solution

GP Strategies based the training solution on data collected from surveys related to critical business functions in each department. As a result, the data from the surveys:

- Assisted in determining which roles would use the care management system
- Identified system tasks that are critical for an employee to perform their job
- Determined the number of end users for each role and the topics to be trained for the roles
- Identified knowledge transfer areas and learning gaps

The major insurance company and GP Strategies collaborated to ensure the business objectives were aligned with the training solution. This was accomplished by working with business owners and support staff to:

- Manage curriculum design.
- Provide resources for meeting key deliverables.
- Provide direction for the project's escalated issues.
- Pair instructional design and instructional resources for parallel development and delivery.
- Identify dedicated subject matter experts (SMEs) from the project team, IT team, and business to assist with providing accurate data, processes, and system/operational requirements.

Using SAM, GP Strategies developed instructor-led, role-based courses, job aids, and software simulations. Courses were outlined based on critical business scenarios. The content was developed iteratively, and multiple SMEs reviewed the content for accuracy. The instructor-led courses included business scenarios that covered critical job functions and provided hands-on practice using a live training system and handouts for each critical task.

From the developed courseware, the organization delivered the training solution to over 2,000 end users. The instructors provided demonstrations to illustrate best practices for system tasks. The insurer and GP Strategies created training that transitions users from using role-based processes/tasks to performing in an experiential learning environment. Post-course surveys showed that a large majority of students were highly satisfied with the training and felt comfortable executing job-critical tasks.

The care management system legacy training covers the following topics:

- Care management system for TOTs
- Intake for commercial utilization management
- Case management
- Medical director
- Medical review
- Member records review
- Utilization management clinical
- Appeals



### Business Impact

This type of project emphasizes determining the critical tasks performed by a business unit and then creating a training solution that focuses on those critical tasks. In addition, real-life scenarios are effective prompts to maintain interest in instructor-led training and are an important component when creating courses that use experiential learning.

SAM works effectively for creating new software deployment training when subject matter expertise is being developed at the same time as training development. Close collaboration, iterative development, and focusing on content, not format, are keys to delivering a high-quality training project on time and on budget.

Overall, the implementation of the care management system legacy training was successful. Productivity was maintained after the system went live. The organization continues to use the training GP Strategies developed for care management system users.

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### About GP Strategies

Founded in 1966, GP Strategies delivers performance improvement programs that strategically align with your unique business objectives and differentiate your global workforce, leaders and salespeople to ensure business excellence. Our sole focus is performance improvement, and everything we do, from technical and compliance training to process improvement and human capital technology integration, is focused on helping your organization deliver meaningful results. Visit [gpstrategies.com](http://gpstrategies.com) for more information.

GP Strategies World Headquarters  
70 Corporate Center  
11000 Broken Land Parkway, Suite 200  
Columbia, MD 21044 USA



[gpstrategies.com](http://gpstrategies.com)  
1.888.843.4784  
[info@gpstrategies.com](mailto:info@gpstrategies.com)

