



CASE STUDY

Saving a Key Broker Partner Time and Money



CHALLENGE

A key broker partner paid an outside consultant per hour to populate spreadsheets used to generate reports for several clients. The consultant was unable to provide the spreadsheets in a timely manner and the practice was costly.

GOALS

- Eliminate the broker's added expense
- Improve turnaround time for generating client reports
- Ensure accuracy and on-time delivery
- Support a full range of reporting needs

SOLUTION

By using the broker's proprietary workbook template, the HealthNow Administrative Services (HNAS) Analytics and Reporting team created monthly report packages, research reports, and various ad-hoc requests. All reports went through

a quality review process with a 99% accuracy rate and were generated and delivered on time.

OUTCOME

The broker no longer needed an outside consultant to populate the spreadsheets, resulting in significant time and money savings. With the assistance of HNAS, the broker was also able to generate custom reports for clients 10–15 business days faster than before.

During the first three quarters of the year, the following were generated for the broker:

- 22,499 reports
- 5,562 report packages
- 98 reports per month for East Coast business
- 349 reports per month for West Coast business

