



PROCESS DRIVEN SOLUTIONS

➔ CASE STUDY

Travel Assistance Company Increases Per-Manager Case Load, Reducing Staffing Costs as Company Grows

“Customer Expressions was able to give us exactly what we were looking for – very quickly. The most impressive part is how easy it was to tailor the software for our business. It’s a fantastic tool.”

— Gaetan Serret,
Business Development Manager

Customer name: Mega Assistance

Challenge:

- Mega Assistance needed a single system to manage all communications and documents related to a case, as well as specific functionality to accommodate auditing and reporting.

Solution:

- i-Sight Case Management Software provided the best of both worlds, a full-featured off-the-shelf solution that could be customized easily to the company’s workflow and needs.
- i-Sight offered built-in functionality like integration of emails and files, and the ability to track costs related to each case.

Results:

- Customer Expressions completed customizations in about one-third the time Mega Assistance’s business development manager would expect for such software projects.
- i-Sight cut about one-third from file-management time, thereby reducing the time to process a file from one week to two or three days.
- Each manager now handles more cases.
- If the company still had paper-based case management, it would need about 50% more staffing for case management.
- Full cost tracking and the ability to immediately locate such information improves customer service and ensures all costs are accounted for.
- The business development manager rates the project at 98 or 99 percent on a scale of 100.

While traveling abroad is always an adventure, unexpected events can affect even the best-organized trips. What if you sprain an ankle, forget an important medication, lose your luggage, or need emergency cash or transportation?

Mega Assistance, based in Vancouver, British Columbia, provides travel assistance services to its clients (principals) and their customers (beneficiaries) around the globe. These companies and individuals rely on Mega Assistance to manage the many logistics involved wherever and whenever an unforeseen event occurs.

For example, if a beneficiary is injured, he or she will need to see a physician, perhaps be admitted to a hospital, have bills run through his or her own insurance based in another country, maybe need translation services, and perhaps require transportation to the airport and back home. Mega Assistance handles the many logistics and payments involved – quickly.

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The company also ensures that its clients and beneficiary insurance companies have the necessary medical documents, and that suppliers, such as hospitals, are paid for their services in a timely manner. Managing thousands of bills each week, Mega Assistance also negotiates with suppliers on the cost of services on behalf of its clients and beneficiaries.

THE CHALLENGE

Case managers at Mega Assistance must keep up with every communication and document related to each beneficiary's case. Working on a global scale, multiple managers across different shifts often need to handle the steps of a case to ensure it is expedited quickly.

Until 2007, Mega Assistance managed travel assistance cases in paper files and multiple electronic systems. Emails were stored in one application, while other case management documents were stored in a separate application. This de-centralized approach slowed case management, customer responsiveness, reporting and audit preparation.

"We needed to keep every piece of documentation for a case in one place so everyone knows what has been provided to beneficiaries and the stage of each case," said Gaetan Serret, Business Development Manager. "The quicker the case is solved on the assistance side, the better it is for everyone, from beneficiary to principal to us."

THE SOLUTION

Mega Assistance searched for a case management solution for several years. Only one offered the core functionality that the company needed for its specific business, as well as the flexibility to be customized even further to Mega Assistance's needs. i-Sight Case Management Software from Customer Expressions offered Web-based case management, and the ability to store both emails and all related documents in an single file.

"When we first saw a demo of i-Sight, we automatically realized what it could do," Serret said. "i-Sight was the only solution that could include all the aspects of what we do together in one piece of software."

With significant experience with business software projects, Serret initially preferred not to embark on a project that involved much customization. However, tailoring i-Sight for Mega Assistance's specific business needs would give the company the best possible solution – without the typical costs and development time normally involved in customizing off-the-shelf solutions.

Customizations in One-Third the Typical Time

Customer Expressions worked closely with Mega Assistance to understand its business and case management workflow needs. Most notably, a consultant tailored i-Sight with some of the specific functionality that Mega Assistance needed for auditing purposes. That included time tagging of each action based on the time zone where it occurred and ensuring that files could never be deleted.

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Customer Expressions completed the project in about two months – about one-third the time Serret has seen with past software customization projects.

“Customer Expressions was able to give us exactly what we were looking for – very quickly,” Serret said. “The most interesting part is how easy it was to tailor the software for our business. It’s a fantastic tool.”

Full Case Details at the Click of a Button

After about a month of testing, Mega Assistance began using the software live for case management. The company stores everything related to a case in one electronic file – emails, faxes, notes, documents, and more.

Case managers rapidly locate the information they need, and always know the current status of a case and next steps, allowing multiple managers to work on one case. Managers can also set reminders to make a call or take a specific action at a certain time, so anyone working on the case never misses a step.

Mega Assistance also tracks all information needed for invoicing for its services and billing from service providers like hospitals. Though the company handles the actual invoices and bills in its accounting software, the information is stored with each file, allowing Mega Assistance to answer questions from clients and know the costs associated with a case easily.

Likewise, managers can answer any questions from clients or beneficiaries immediately, without having to sort through paper files and return calls.

“With a click of a button, we know exactly what has gone on with a case,” Serret said. “It’s really fantastic. That means better and quicker service to all our principals.”

Mega Assistance also creates reports for any stored field in i-Sight, reducing the time to prepare information for audits and giving the company insight into case management efficiency.

THE RESULTS

Soon after going live with the software, Mega Assistance noticed significant case management efficiency gains. Serret notes that i-Sight cut about one-third of the time it took previously to manage files, thereby reducing the time to process a file from one week to two or three days. As a result, each manager handles more cases.

“If we still had paper-based case management, we would need about 50% more staffing for case management,” Serret said. “We had intended to hire more people as the business has grown, but that is on hold to see how staffing needs change now with i-Sight.”

With all files in one location, Mega Assistance more easily calculates the number of communication records involved in a case, allowing it to plan and staff accordingly. Reporting also offers an understanding of the efficiency of each case manager, so Mega Assistance knows which managers are faster and whether some need additional training.

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