Sharp Health Plan uses Smartsheet to improve how it serves members

Sharp Health Plan uses Smartsheet to streamline business processes including resolution of service issues, project management, regulatory reporting planning, and requests for process improvement consultation.

SHARP
HEALTH PLAN

Customer:
Sharp Health Plan

Industry:
Health Insurance

Organization Size:
Medium (50 - 999 employees)

Region:
North America

Website:
sharphealthplan.com

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Sarah Calleran, Project Coordinator, Customer Experience and Improvement Team, Sharp Health

smartsheet

Established in 1992, Sharp Health Plan is a not-for-profit, commercial health plan based in San Diego.

Background
Sharp Health Plan is the highest member-rated health plan in California, an achievement it's earned annually for the last five years. That's no surprise given its focus on excellence. Sharp Health Plan aims to improve transparency, accountability and efficiency — with a sense of continuous improvement serving as the heartbeat of operations, all in the name of patient care. In its quest to improve essential processes, from regulatory reporting planning to service issue resolution, Sharp Health Plan turned to Smartsheet.

Solution
"We're doing everything we can to make access to care as seamless as possible for everyone involved," says Sarah Calleran, project coordinator for the Customer Experience and Improvement Team at Sharp Health Plan. *"We're really trying to elevate the member experience, and to streamline and automate our internal processes so we can focus our efforts on higher-level strategic thinking."*

When Calleran joined Sharp Health Plan as a marketing coordinator, the team was using Smartsheet at a basic level. An outside consultant introduced the platform to manage a special project, but the platform's full capabilities were unknown to staff. Seeing Smartsheet's potential, Calleran dived in to the library of online learning resources, and tapped her customer success managers for insights and guidance. Soon she was creating solutions with dashboard reporting, automated features and customized alerts to streamline and standardize marketing team processes.

Then Calleran moved to the Customer Experience and Improvement Team, which needed a new approach for identifying and dealing with service issues. There was no clear process to follow, and if the person who noticed a problem wasn't directly affected by it or working directly with a plan member who was, they might never get an update on how the issue was resolved. There was also no single repository of past solutions to refer to. This could result in extra work for employees trying to solve problems they'd been assigned.

"What's really awesome about the staff here is that they'll go above and beyond and do everything they can to make things right for the members," Calleran says. *"We didn't have a central place to gather and retrieve information. So staff would stay late, have extra meetings or do whatever was needed to track down the information, because we*

Customer:
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want to maintain that excellence. But we knew this wasn't sustainable and wanted to find a better way."

Scaling processes with Smartsheet

Today Sharp Health Plan uses Smartsheet to bring visibility and accountability to the service-issue tracking program. Anyone at the organization can submit an issue through a Smartsheet form, and issues can even be submitted confidentially. Employees can easily view the status of issues in process by accessing the program sheet, and automated alerts let submitters know the outcome of the issue they've identified.

The Customer Experience and Improvement Team doesn't just look for one-time solutions — they also perform Lean Six Sigma root-cause analyses to identify the broader issues that lead to problems. Using Smartsheet makes it easier to identify recurring problems and compare similar problems to find shared contributing factors.

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Sharp Health Plan now uses Smartsheet to streamline and improve a wide range of business processes. Calleran's team set up a Smartsheet form that lets other teams request a consultation on how to manage their own process improvement projects. An initiative is underway to set up a standardized project management process and template so the project management office can more easily track projects across the organization. And the Health Services Division uses it to manage all of the plan's reporting to regulatory entities such as the California Department of Managed Health Care (DMHC).

The Chief Medical Officer's team is also using Smartsheet to manage business practices, manage work plans and meeting schedules and agendas, and track and display division metrics. Lisa Mills, administrative assistant to the CMO,

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set up individual dashboards that provide owners of division policies and procedures and medical policies with access to the information they need to review and approve on a regular schedule. Automated alerts let owners know when specific policies are due for review, and enable her to track engagement and follow up when necessary.

"Smartsheet has enabled us to move our day-to-day operations from multiple folders on a shared drive to one location." Mills says. *"It also gives us the ability to share information with our business partners outside of Sharp Healthcare. We continue to learn new ways to help streamline our business processes."*

"We've never had anything that's been able to give us the transparency we have today, in such an easy-to-use format," Calleran says. *"It has driven a huge shift in our culture, because people understand what they're responsible for and we're closing the loop. It wasn't always clear before. Now we have accountability with automation, notifications, update requests and approval requests. Those are all huge."*

Transforming programs and strategy

Smartsheet isn't just simplifying processes, it's helping the health plan function at a higher level. The old processes made it difficult to see how different reported issues shared common characteristics across service areas or groups of plan members. With Smartsheet, similar incidents are easier to spot and compare, enabling leadership to not only solve isolated problems, but identify more complex problems and develop strategic, proactive solutions.

"Smartsheet has been very easy for our team to adopt," says Erica Stanley, director of Compliance & Regulatory Affairs. *"It is intuitive and easy to learn. There are many great free online resources and educational tools to help learn the application, everything from learning the basics to learning advanced tools and techniques. It has become a staple for department, used for everything from tracking everyday work and regulatory filings, to reporting key metrics and managing complex projects."*

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