# Empowering End-Users:
## A Journey from IT-Centric to Self Service Data & Analytics

Jay Lindeman
Advisor, Business Intelligence Developer

April 18, 2024

# About Me

**Jay Lindeman**

Advisor, Business Intelligence Developer

- Analytic Solutions Architect
- Automation & Self-Service Analytics

- Responsible for measuring and analyzing data supporting pricing, financial performance modeling, and the overall reimbursement strategy for the plan's provider network.

- Corewell Health Tableau Trainer
- Alteryx Evangelist

**Priority Health**

# Overview

Embark on a transformative journey as we navigate the evolution of Priority Health's data and analytics landscape from traditional request fulfillment to a dynamic self-service culture.

As an internal consultant, I'll share insights into how our organization shifted gears, liberating end-users from reliance on ad-hoc requests, to fostering autonomy through self-service.  Discover the strategic transition that unlocked the true potential of our workforce, enabling them to generate their own insights.

Join me as we explore the benefits, challenges, and key milestones in this paradigm shift, paving the way for a more agile and empowered data-driven future.

# Agenda

**Self-Service Overview**

**BARRIERS**

**SOLUTIONS**

CASE STUDY

**USE CASE**

Priority Health
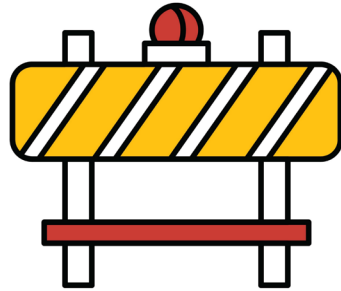
# A Brief Overview

# Self-Service & Automation

| TRUTHS | MYTHS |
|--------|-------|

**Insights on-demand**

Enabling customers with the data they want, at the time its needed.

**It's only about technology**

Self-Service reaches into empowerment culture, knowledge sharing, and process streamlining

**Mindset matters**

A shift in perspective that pushes users to take control

**Development is costly**

While up front costs might be unplanned or costly, the overall positive impact is often a net gain

**Efficiency booster**

How can we solve many problems with the same process

**Optimization = Automation**

Optimization, is not the inherent replacement of manual efforts

Priority Health

# Benefits



**Consistency**  01

02  **Speed of Insights**

**Scaled Solutions**  03

04  **Increased Productivity**

Automation & Self-Service

**Quality & Governance**  05

06  **Elevated Satisfaction**

**Liberation of Resources**  07

08  **Reduced Operating Cost**

**Priority Health**
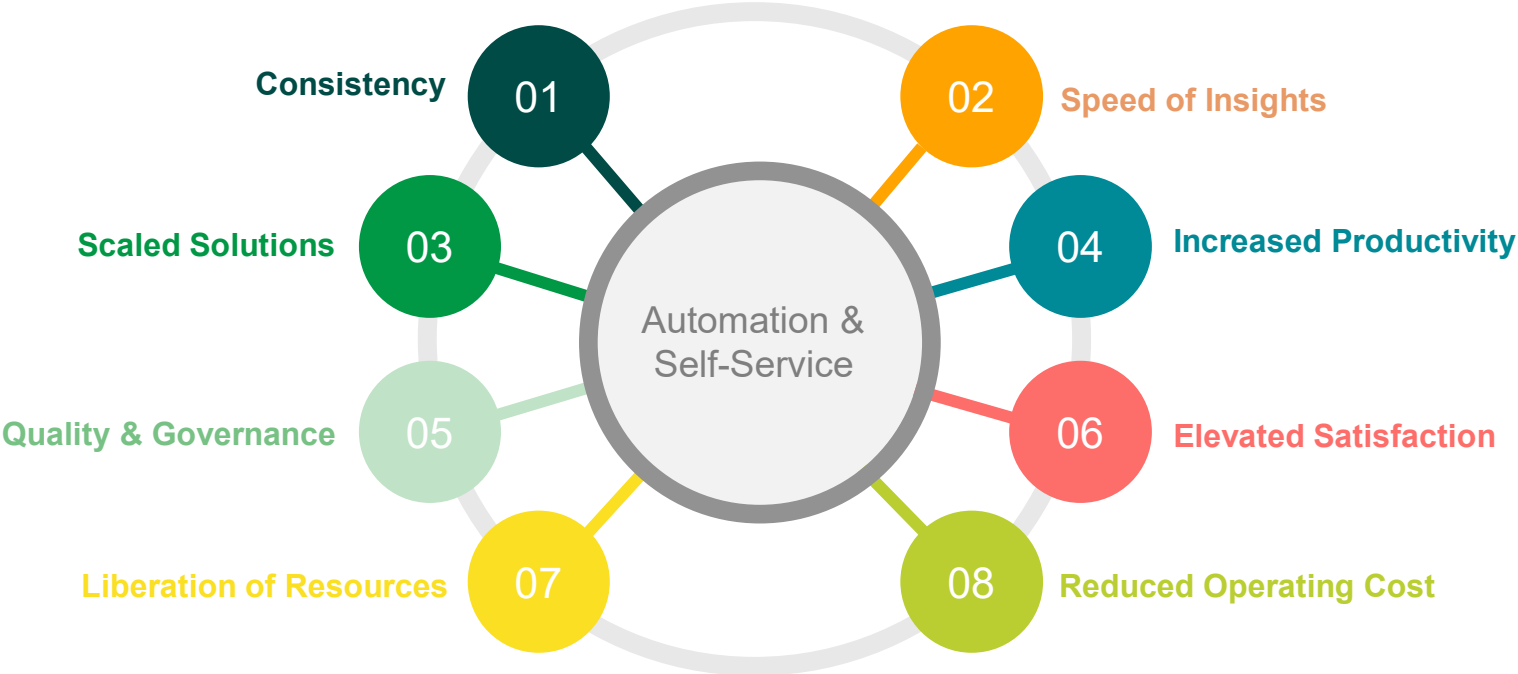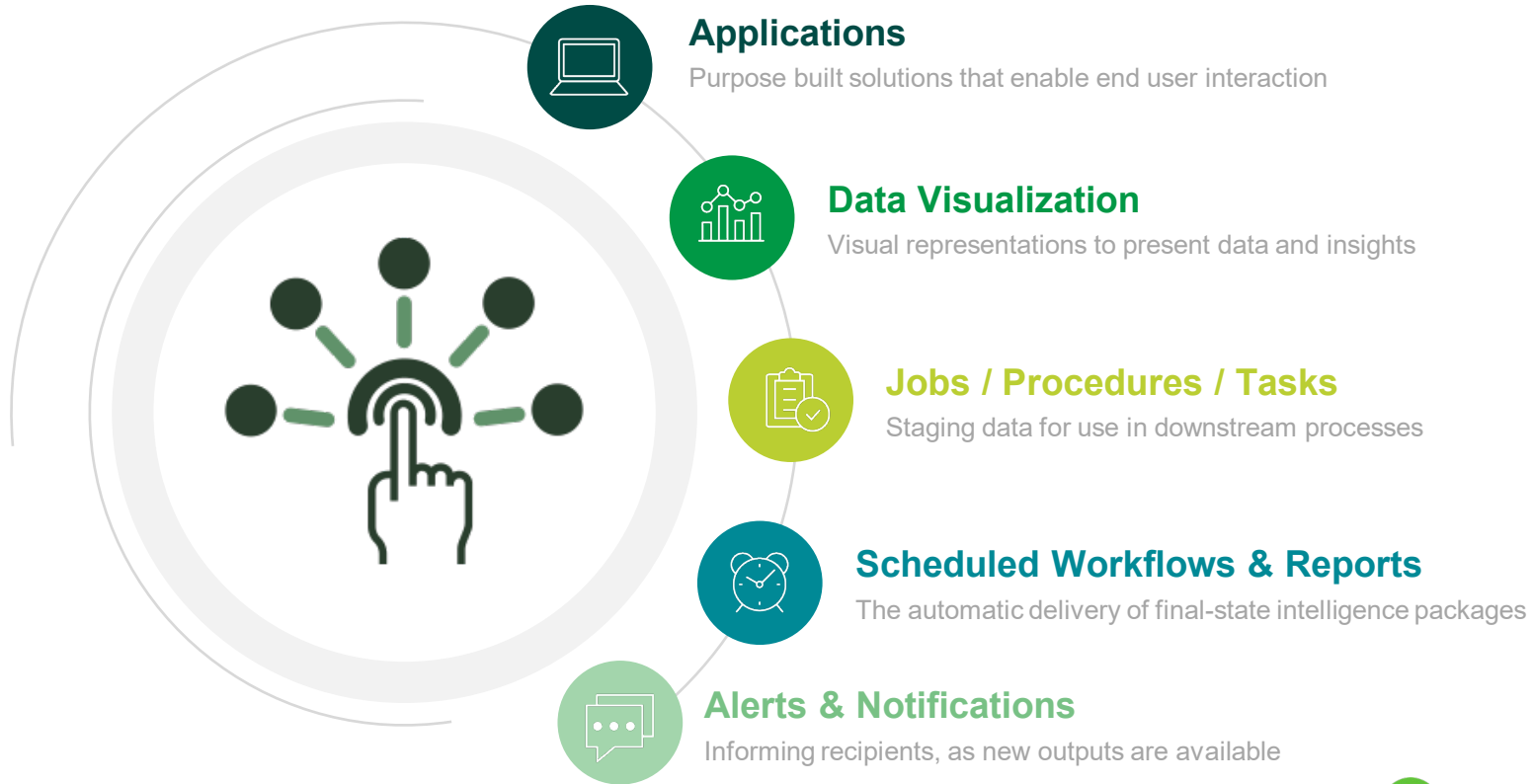
# Barriers to Achieving Success

# Barriers to Self-Service & Automation

Why might there be resistance to advancing capabilities?

## Emotional

What are the psychological considerations to helping people embrace?
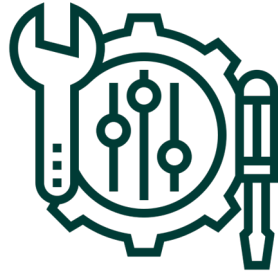
## Physical

What tools or platforms do developers have to work with?

## Structural

Is the data structure conducive to automation and scalability?

## Mental

What skills and training might be necessary for both the developers and customers?

Priority Health

# Emotional Barriers

## More than Practical Solutioning

How do developers or analysts maintain a sense of worth amidst technology that threatens to remove the person from the solution.

**1** | **Job Security**

**2** | **Threats to Livelihood**

**3** | **Retraining Our Brains**

**4** | **Departure from the Mundane**

# Physical Barriers

## What platforms do you have access to?

The market is saturated with business intelligence and development tools. The ones you have access to will greatly influence your ability and approach to building self-service solutions.

**1** | **Visualization Tools**

**2** | **Report Builders**

**3** | **Workflow Management**

**4** | **Scheduler Options**

Priority Health

# Structural Barriers
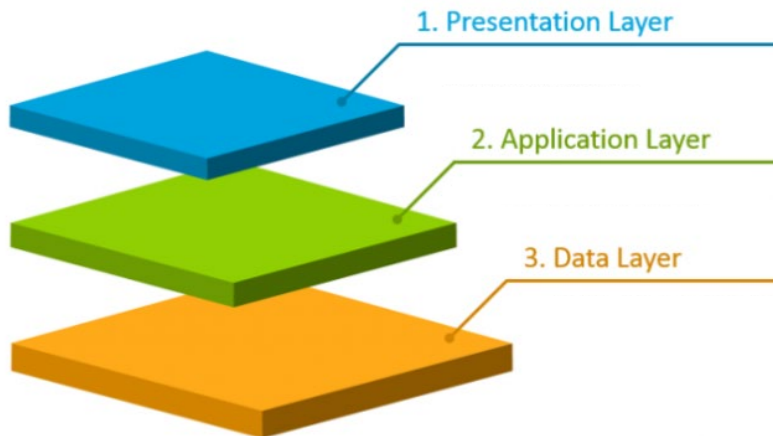
**Show me the data!**

Data goes through many transformations on its way from collection to insights. It is the foundation for automation. Well developed data structures enable effective automation.

1. Presentation Layer

2. Application Layer

3. Data Layer

**1** | **Data Models & Layers**

**2** | **Availability & Quality**

**3** | **Data Team Roles**

**4** | **Environments & Servers**

Priority Health

# Mental Barriers

**It's a mindset, not a capability**

Scaled solutions requires scaled thinking.  Consider the knowledge, training, skills, and readiness gaps you need to bridge prior to building automation.

**1** | **Knowledge & Training**

**2** | **Skills & Capabilities**

**3** | **Ad-Hoc vs Scaled**

**4** | **Customer Readiness**

Priority Health

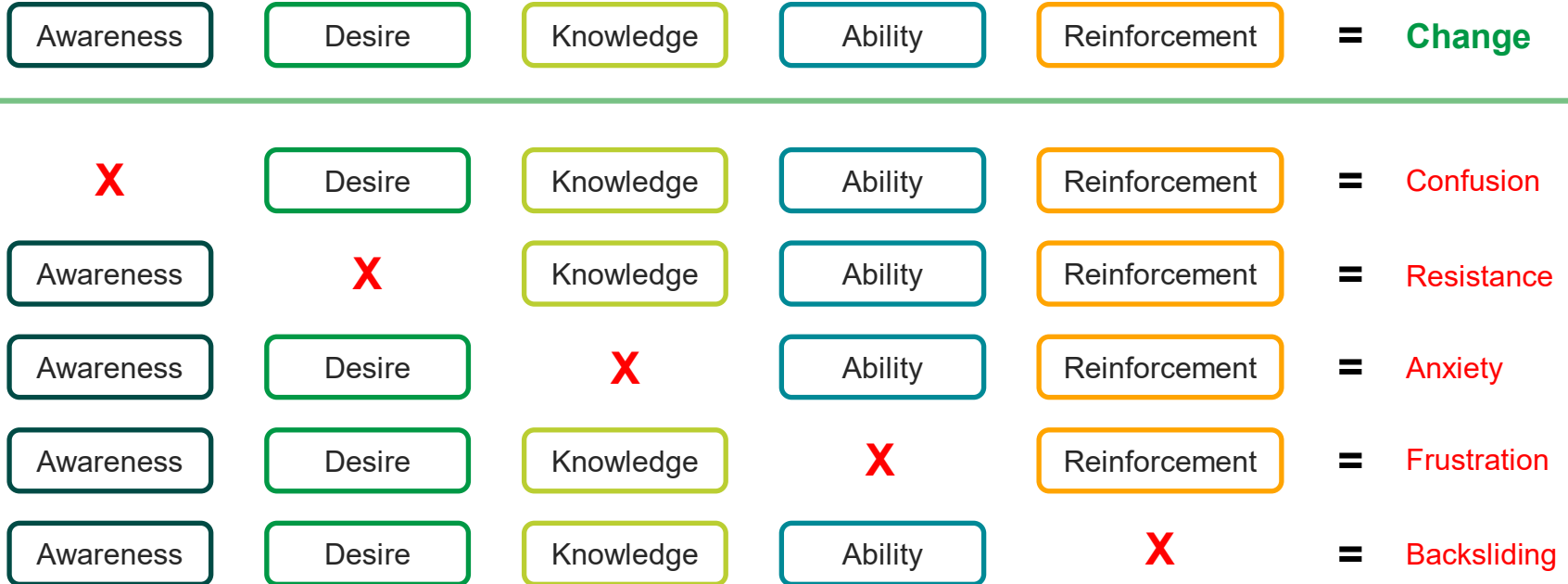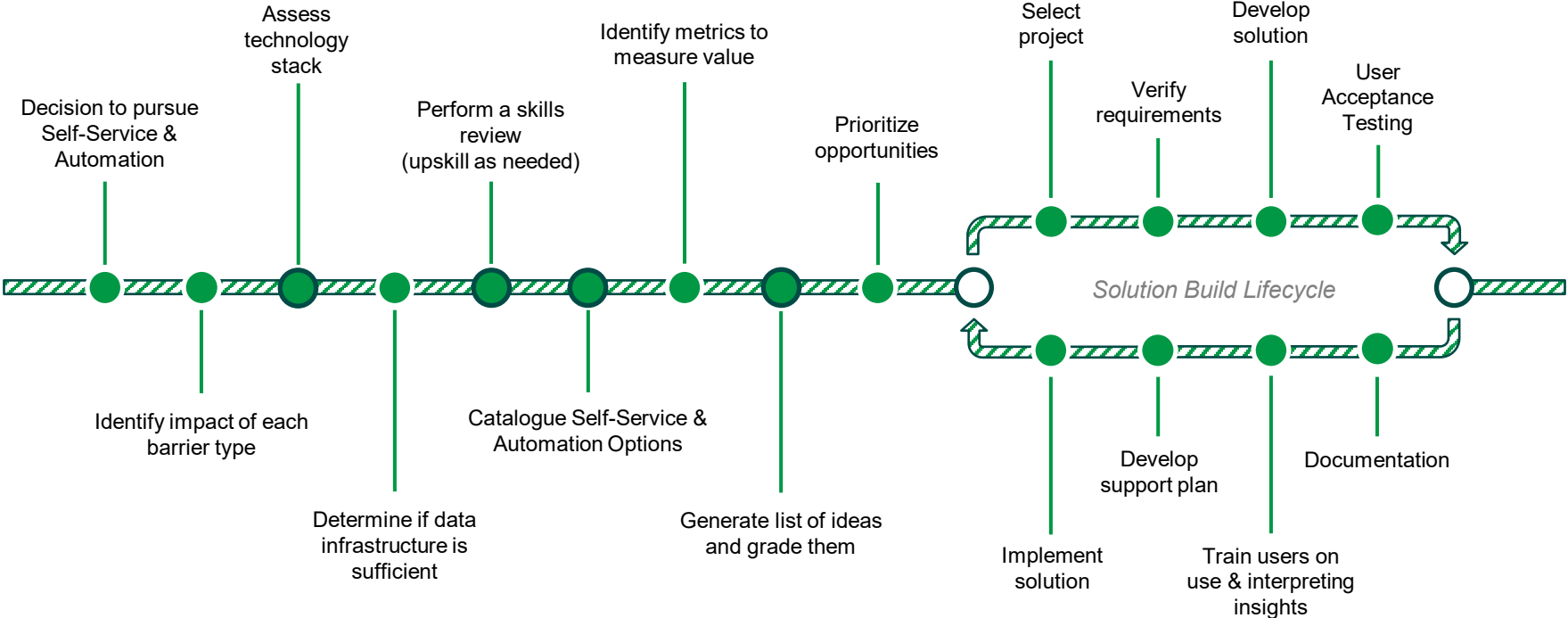# A Solution Oriented Mindset

# Deciding to Evolve

- Navigate change management, knowing we were addressing two distinct audiences:

    - Developers & Users

- Choose projects that balance value and time-savings

- Ensure self-service was being built within the best suited platform(s)

- Liberate end-user reliance on ad-hoc requests, empowering them to be curious & autonomous



**Priority Health**

# ADKAR Change Management Gap Model

| Awareness | Desire | Knowledge | Ability | Reinforcement | **=** | **Change** |
|---|---|---|---|---|---|---|
| **X** | Desire | Knowledge | Ability | Reinforcement | **=** | Confusion |
| Awareness | **X** | Knowledge | Ability | Reinforcement | **=** | Resistance |
| Awareness | Desire | **X** | Ability | Reinforcement | **=** | Anxiety |
| Awareness | Desire | Knowledge | **X** | Reinforcement | **=** | Frustration |
| Awareness | Desire | Knowledge | Ability | **X** | **=** | Backsliding |

Priority Health

# Key Milestones



Decision to pursue Self-Service & Automation

Identify impact of each barrier type

Assess technology stack

Determine if data infrastructure is sufficient

Perform a skills review (upskill as needed)

Catalogue Self-Service & Automation Options

Identify metrics to measure value

Generate list of ideas and grade them

Prioritize opportunities

*Solution Build Lifecycle*

Select project

Verify requirements

Develop solution

User Acceptance Testing

Implement solution

Develop support plan

Train users on use & interpreting insights

Documentation

Priority Health

# Choosing the Right Platform

- Tableau
- Qlik Sense
- Power BI
- R Shiny

**Data Visualization**

- Alteryx
- Informatica
- SAS
- DBT

**Workflow & Data Prep**

- Business Objects
- Crystal Reports
- Power BI
- SQL

**Report Building**

- Streamlit
- Alteryx
- APEX
- R Shiny

**Application Builders**

- Python
- PL/SQL
- R
- SQL

**Languages**

- Windows Task Sched.
- CRON
- Master Job Scheduler

**Schedulers**

Priority Health

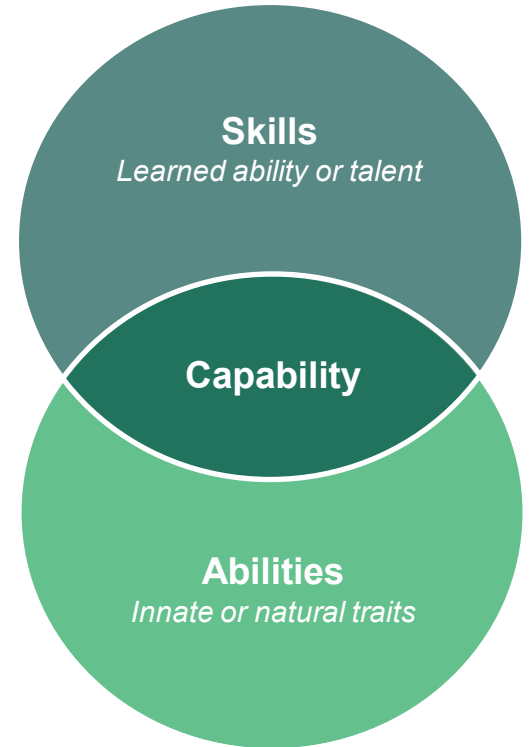# Skills Review

**Organizational Skills Assessment**

We must be honest with ourselves. Who can solve these problems today? Who can be trained to assist tomorrow? Not everyone is suited to solving problems in this way.
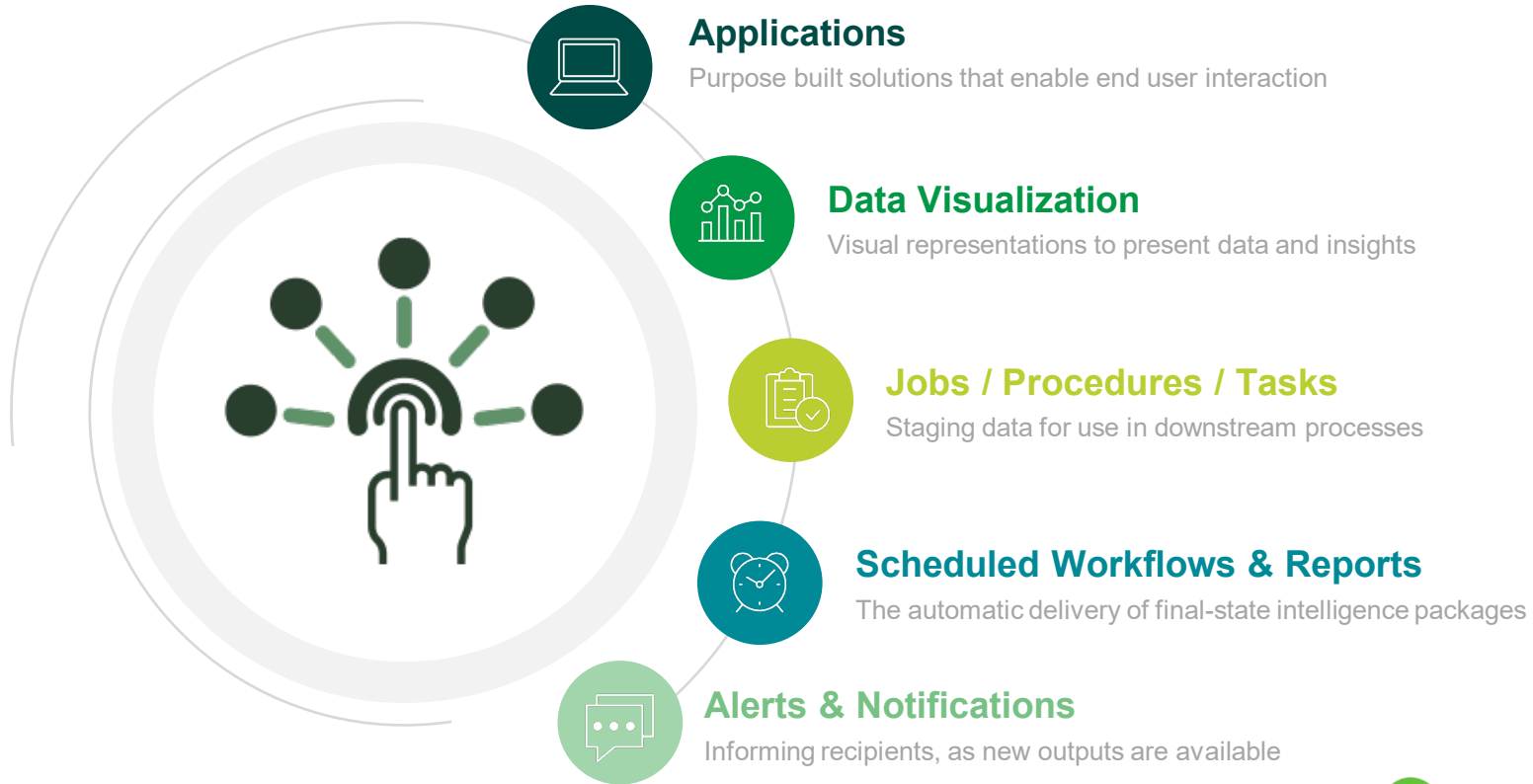
**1** | **What is the total talent pool?**

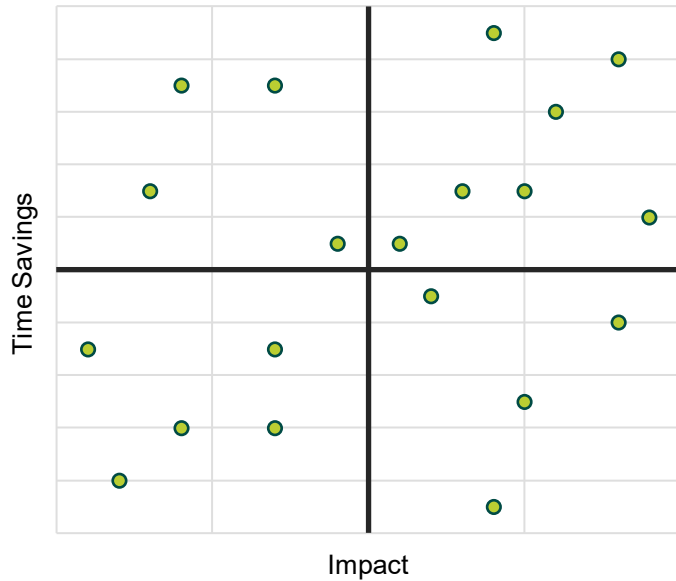**2** | **What platforms do we have proficiency within?**

**3** | **Who possesses a scaled mindset?**

**4** | **How can we support education for tomorrow?**

**Skills**
*Learned ability or talent*

**Capability**

**Abilities**
*Innate or natural traits*

Priority Health

# Types of Self-Service & Automation

**Applications**
Purpose built solutions that enable end user interaction

**Data Visualization**
Visual representations to present data and insights

**Jobs / Procedures / Tasks**
Staging data for use in downstream processes

**Scheduled Workflows & Reports**
The automatic delivery of final-state intelligence packages

**Alerts & Notifications**
Informing recipients, as new outputs are available

**Priority Health**

# Assessing Value & Prioritizing



There are many ways to assess value. Cross-dimensional plots help visualize the intersection of impact and volume.

**1** | **Impact to the business**

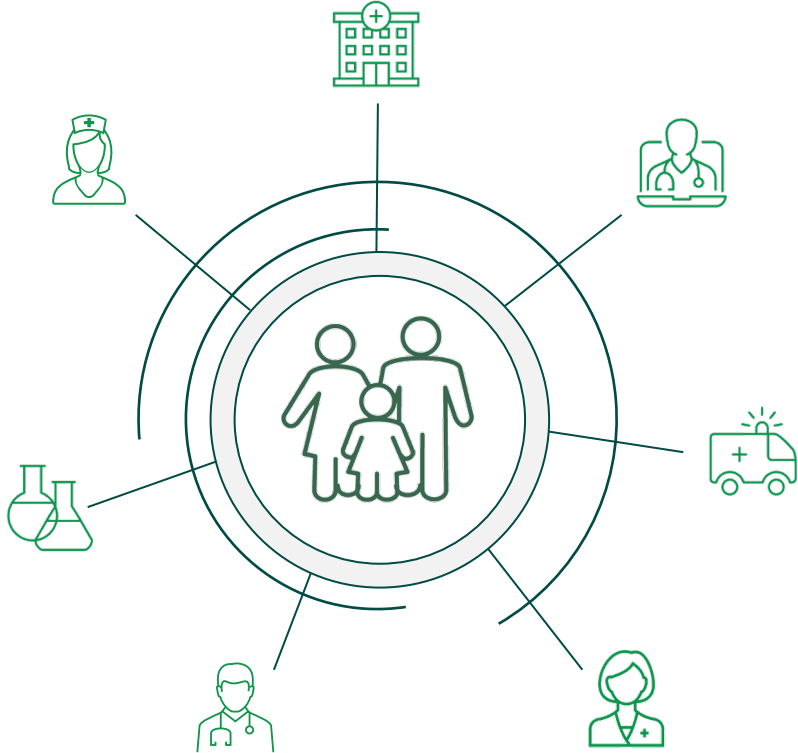**2** | **Time savings**

**3** | **Does the work directly tie back to a core value or a strategic goal?**

**4** | **Is there anything we should stop doing?**

**Priority Health**

# Provider Disruption Reporting

**Case Study Overview:**

Involves comparing a group of member's use of providers in one network, against an alternative network; to measure switching "disruption" and identify cost savings opportunities.
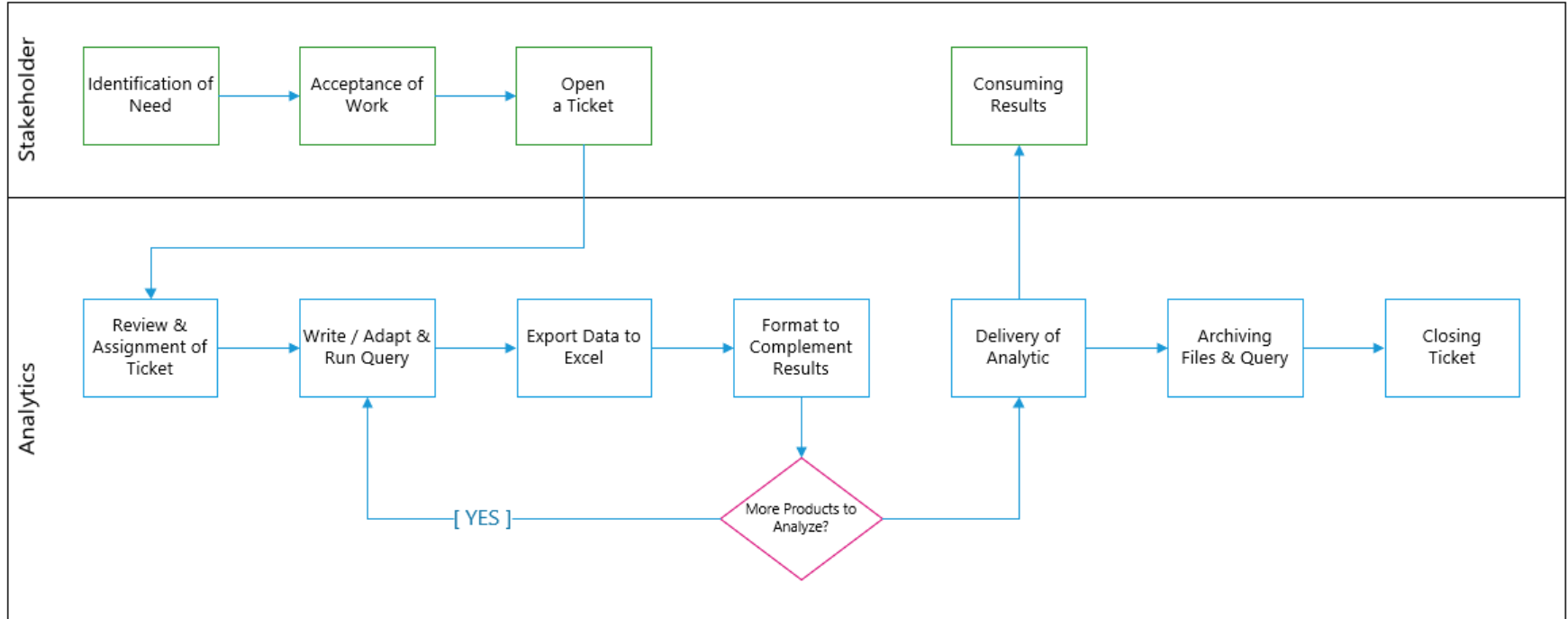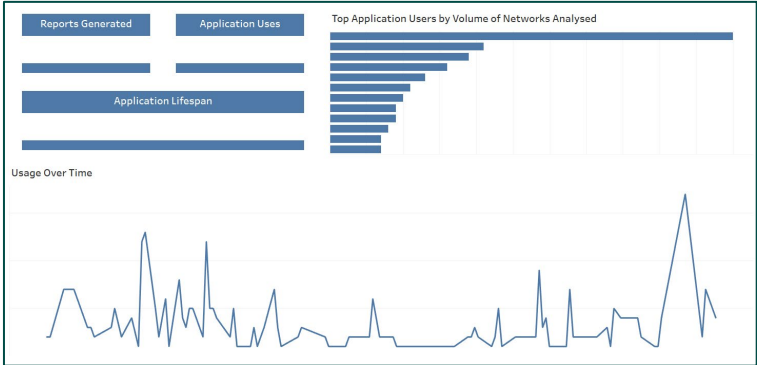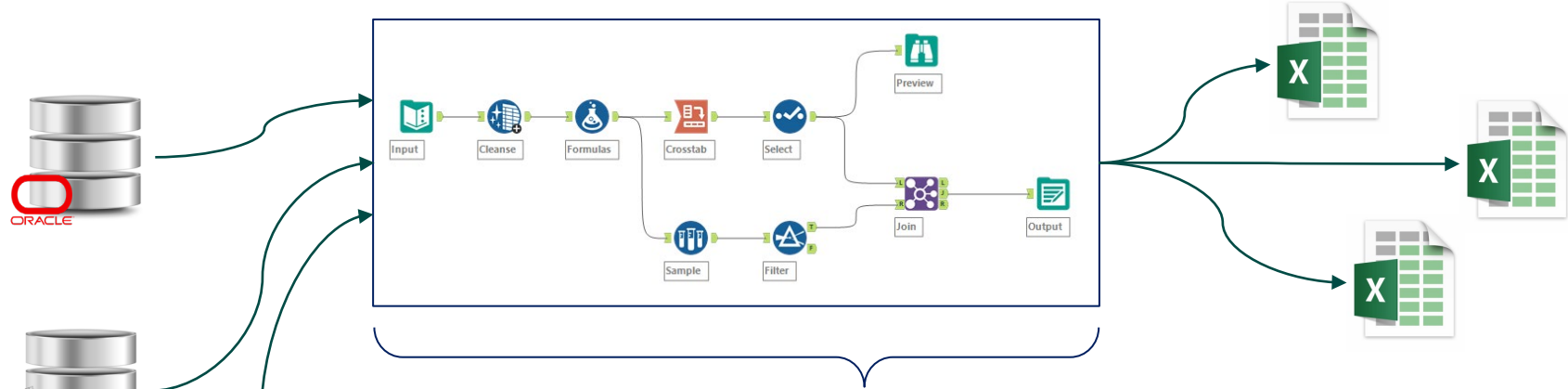
**1** | **Better Access**

**2** | **Lower Premiums**

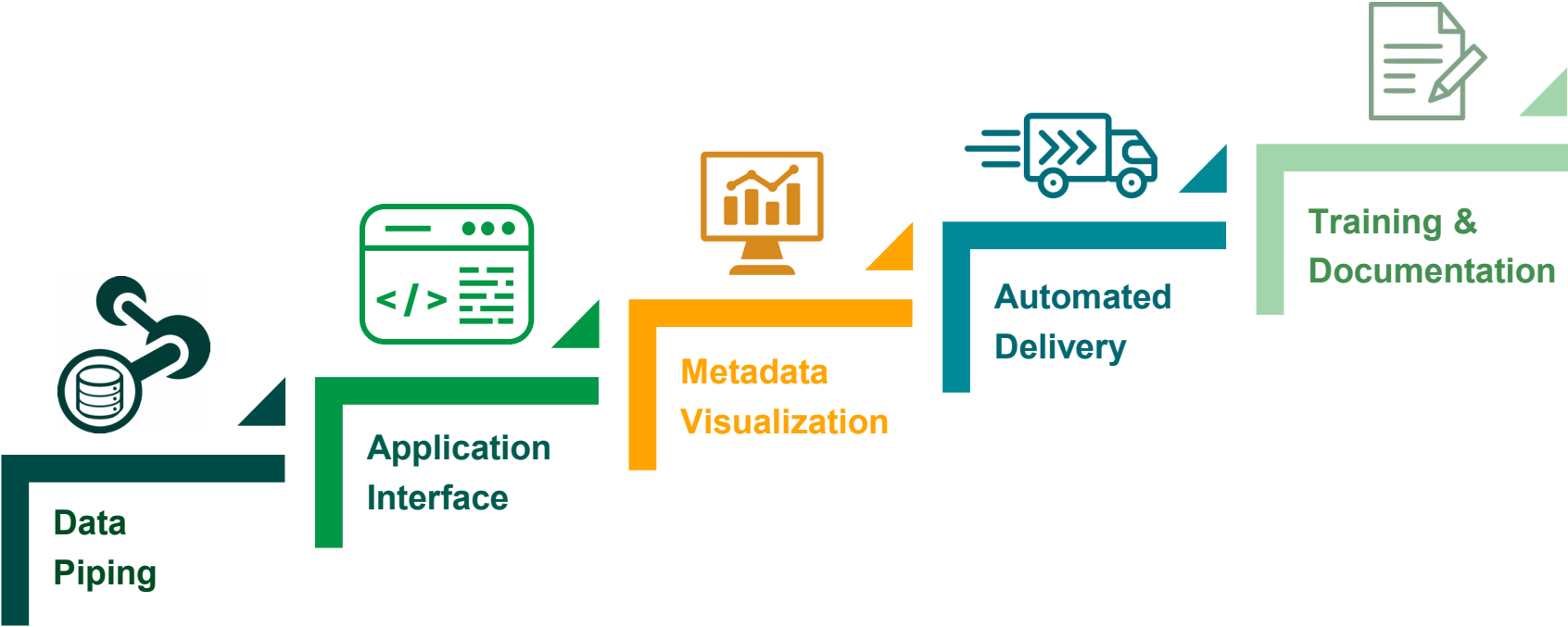**3** | **Growth & Retention**

**4** | **Continuous Learning**

# Understanding Current State

# Conceptualizing the Solution

# Self-Service & Automation Components



**Data Piping**

**Application Interface**

**Metadata Visualization**

**Automated Delivery**

**Training & Documentation**

Priority Health

# Measuring Success

Immediate Results

Enabling Exploration

Greater Effectiveness

Reports Generated

**254** App. Uses

**316**

**28** Weeks in Production

**28** Users

Priority Health

# Evolve Customer Expectations

How can you make your customers more comfortable ordering from the salad bar, than they are at the deli counter?





Priority Health

# Keep Up the Momentum

- Have a robust list of ideas in your backlog to draw from

- Plan for regular releases of new solutions

- Protect earned time savings

- Solutions must be stable and reliable



Priority Health

# …And of Course, Use Lots of Buzzwords

**Priority Health**

# Thank You

Jay Lindeman
jason.lindeman@priorityhealth.com
616.464.8025

https://www.linkedin.com/in/jaylindeman/