

## Teachers Health Improves Customer Service with SharePoint



### Overview

**Country or Region:** Australia

**Industry:** Health Insurance

### Customer Profile

Teachers Health provides private health insurance and access to an extensive network of service providers and supporting health initiatives to teachers across Australia.

### Business Situation

To meet industry compliance requirements and to achieve cost savings through operational efficiencies, Teachers Health needed to find a way to better share information and ensure consistency in all member communications.

### Solution

- Windows Server® 2003
- Windows® SharePoint® Services 3.0
- Microsoft® SQL Server® 2005

### Benefits

- A focal point for creating, managing and sharing information
- Enhanced document management
- Greater productivity and staff satisfaction
- Better customer service and consistency

“The end result is better productivity and more time for staff members to serve others.”

Mark Sinclair, Executive Manager, People & Learning, Teachers Health

Teachers Federation Health is a not-for-profit health fund dedicated to providing quality health access for teachers, educators and support staff. It employs 150 staff who service more than 95,000 policy holders. With all procedures and policy files stored on a single server, updating related documents was cumbersome as staff couldn't open multiple versions of the same document at the same time. In 2008, Teachers Health transferred its core files onto Microsoft's collaboration platform, Windows® SharePoint® Services 3.0. Team leaders were able to take ownership for the most important documents in their departments. Staff were able to share the development of new documents, update old documents faster, and use automatic workflows to help manage core business processes.



“What we needed was to create a collaborative environment where information could be shared among staff, where there was uniformity of information and where there was a single reliable source for each document.”

Mark Sinclair, Executive Manager, People & Learning, Teachers Health

## Situation

Teachers Health is a not-for-profit health fund dedicated to providing quality health access for teachers, educators and support staff. The organisation prides itself on offering the best and most relevant, affordable cover options and related services to all eligible members. Established in New South Wales in 1954, the fund employs 150 staff who service more than 95,000 policy holders and approximately 223,000 members throughout Australia.

In 2007, Teachers Health entered a period of significant change, renewal and growth. A new management team began examining the organisation’s processes and technologies. It believed that better information management was key to building better customer service and a stronger, more efficient fund.

Over the next two years, Teachers Health embarked upon a raft of technological changes to improve its core in-house system – the Hospital and Medical Benefits System. In addition, management began exploring ways of introducing greater uniformity and more efficiency into the organisation’s information and office systems.

“We had an unmanageable shared drive where all documents were filed,” says Mark Sinclair, Executive Manager, People & Learning, Teachers Health. “Everything was stored there. The People & Learning team, for example, had over 150 Microsoft® Word documents on organisation policy and procedures, all with interlinked references. It was very cumbersome to maintain and difficult to find information.”

Because the documentation was largely stored in Word files or spreadsheets,

only one copy of the document could be opened at any time. This meant that if someone in the contact centre had a policy document open as they responded to a membership query, no other agent could access the same data.

“What we needed,” says Sinclair, “was a collaborative environment where information could be shared among staff, where there was uniformity of information and where there was a single reliable source for each document.”

Teachers Health believed it required an intranet. An intranet would not only provide the platform for sharing, it could also help ensure compliance with the Private Health Insurance Administration Council’s code of conduct, which demanded consistency, training and competency from all health insurance customer service staff.

## Solution

In 2008, Teachers Health began looking for a system by researching what similar companies had implemented.

“We looked at other private health insurance firms and companies in other industries to see what they had,” says Sinclair. “While the end product seemed the same, they all had different ways of achieving it.

“We eventually decided on Microsoft SharePoint because of the IT platform underpinning it. We use Microsoft Office and could link all those applications to SharePoint easily without having to write any new interfaces.”

Microsoft Gold Partner and performance management specialist The CALUMO Group was selected to deploy the solution.

"It used to take one person at least a month to make all the changes and updates. Now they just have to do it once."

Mark Sinclair, Executive Manager, People & Learning, Teachers Health

"CALUMO came in to do a presentation on data mining to one of my colleagues in customer service," says Sinclair. "My colleague was impressed with them and asked me to talk to them about the intranet.

"They were able to articulate how they would implement an intranet into Teachers Health in a fairly simple manner. They were much more straightforward than some of the other vendors we spoke to and they were more convincing. Plus their costing was good."

Deployment of the system was divided into two stages over three months starting in December 2008. The first phase involved making the intranet ready and available on all staff PCs. The second stage involved moving the most essential data from the shared drive onto the SharePoint Server. This made SharePoint an essential daily tool for most staff, hastened the adoption of the intranet and lessened the previous dependence on the shared drive.

The entire system is decentralised. Rather than making one IT person the sole controller of SharePoint, Sinclair was keen to keep the information management process and system collaborative. 'Champions' were appointed in each business area and taught to show others how to use the system.

The champions were also given responsibility for progressively saving new work to SharePoint and for transferring any remaining valuable data from the shared drive.

## Benefits

Within 12 months of starting the project, Teachers Health had the collaborative platform it was seeking. In the process, it has developed significantly enhanced document management capabilities including version control, check-in-check-out monitoring and formal approval processes.

Complex related documents have been placed on the SharePoint Server and transformed into wiki files with inbuilt links. This means, for example, that any change to one policy document glossary now automatically flows through all 167 other policy document glossaries.

"It used to take one person at least a month to make all the changes and updates. Now they just have to do it once," says Sinclair.

Each department has its own site within the intranet portal, enabling intranet champions and team leaders to create, update, manage and share information relating to their work area.

Early experiments with the workflow components within SharePoint are helping to smooth the path of some account activities. Tasks are more easily assigned, managed and tracked. An increasing number of forms is being placed on the system, and business reports can be published online quickly and easily, reducing the need to continually print out documents.

Most importantly, the new system is helping to deliver better customer service.

"SharePoint allows us to access the information we most need quickly," says

## For More Information

For more information about Microsoft products and services in Australia, call 13 20 58.

[www.microsoft.com](http://www.microsoft.com)

For more information about Calumo products and services, call +61 2 8985 7777 or visit the Web site at:

[www.calumo.com](http://www.calumo.com)

For more information about Teachers Health products and services, call 1300 728 188 or visit the Web site at:

[www.teachershealth.com.au](http://www.teachershealth.com.au)

Sinclair. "By doing that we are reducing our contact centre calls because the information is correct, and we don't have to do reworking or call customers back to verify data.

"The end result is better productivity and more time for the staff members to serve others."

## Microsoft Server Product Portfolio

For more information about the Microsoft server product portfolio, go to: [www.microsoft.com/servers/default.msp](http://www.microsoft.com/servers/default.msp)

### Software and Services

- Windows Server 2003
- Windows SharePoint Services 3.0
- Microsoft SQL Server 2005

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