



CASE STUDY

IEHP Drives Enterprise-Wide Process Improvement Through Workfront

Workfront bridges work team silos, enabling health plan departments to reduce time, improve abilities to meet SLAs, and increase efficiency

While other healthcare organizations talk about optimizing processes, Inland Empire Health Plan (IEHP) has taken significant steps to achieve results. Process improvement is part of IEHP's culture. Embracing Lean methodologies and using Workfront to reduce paper and connect siloed teams, IEHP is continuously transforming manual processes into more efficient and productive ways to work. At the fast-growing health plan, Workfront has reduced ergonomic assessment process time from weeks to hours, improved Purchasing's ability to deliver on service-level agreements (SLAs) by 500%, and increased Marketing efficiency by 15–20%.

IEHP has a mission: to organize and improve the delivery of quality, accessible, and wellness-based healthcare services for its community. The not-for-profit Medi-Cal and Medicare health plan, headquartered in Rancho Cucamonga, California, has a network of more than 6,000 providers and 2,000 employees that provide comprehensive managed health care coverage to more than 1.2 million residents of Riverside and San Bernardino counties. enrolled in Medi-Cal or Cal MediConnect (Medicare-Medicaid Plan).



A Public Entity

Inland Empire Health Plan

-  Inland Empire Health Plan
-  Healthcare
-  www.iehp.org
-  Rancho Cucamonga, California

At a Glance

Challenges

- Inefficient, manual processes
- Email-based collaboration
- Disconnected communications

Benefits

- Reduced ergonomic assessment processing time from 4 weeks to 24 hours
- 500%+ improvement in ability to deliver on SLA
- 15–20% efficiency in marketing
- Increased insight and visibility
- Increased accountability
- 90–95% reduction in asset discovery time
- More productive meetings
- Breaking down organizational silos
- More empowered employees

The Challenge

IEHP operates seven divisions with more than 100 departments and sub-departments. The impact of a wide variety of initiatives, priorities, and resource constraints resulted in work silos across the organization. Committed to continuous operational improvement, the health plan has invested heavily in Lean methodologies and has concurrently sought to expand an existing Workfront deployment to better connect teams and processes.

"Most team members have been trained to rely on email and paper at work," explains Michelle Gracey, IEHP's Application Services Manager. "We recognized moving paper from one place to another created significant delays, so we needed to combine better process with proven technology to make our teams more efficient."

Within and across teams, IEHP was experiencing process delays:

Human Resources

When a new employee onboards at IEHP or if an existing employee has difficulty with workspace equipment, Human Resources (HR) orders an ergonomic assessment. Individuals used to have to email HR with their requests, wait to be scheduled, participate in an assessment, wait again for a report, then based on the findings, wait for HR and Purchasing to coordinate on the acquisition of the newly recommended equipment (e.g., a chair or keyboard). The complete process could take up to four weeks with potential for additional delays because historical data wasn't readily available to support predicting and storing frequently requested equipment as inventory.

Purchasing & Accounts Payable

The Purchasing team experienced similar process delays. As a public entity, IEHP relies on its

Purchasing team to manage all vendor contracts and ensure proper Governing Board approval is obtained for all goods and services. When contracts are awarded, the Purchasing team is responsible for adding new vendor details and approved funding amounts into IEHP's ERP system. However, Purchasing's colleagues in Accounts Payable are responsible for paying every vendor invoice submitted, which often requires ad hoc, back-and-forth email communications between the teams about whether a vendor has been approved, and for what payment amount.

The disconnected process, involving up to a dozen employees across departments, offered no simple way to reconcile issues such as when an invoice was received from a vendor that was not in the system as an approved vendor or that exceeded approved spending authority limits. Emails, even shared mailboxes, resulted in lost communications and overlooked details, lengthening the time it took for invoices to be paid. This meant the team often missed its internal SLA of paying invoices within 20 days of receipt, and also the net 30-day payment commitment on most IEHP contracts.

Marketing

Inefficient processes also began to negatively impact the productivity of the IEHP Marketing team. The IEHP Marketing team, of approximately 25 individuals, relied on a project intake solution that lacked workflow policies, making it easy for requestors to bypass many of the fields that the Creative team needed to produce high-quality work. As a result, employees had to engage with business units directly to better understand their delivery requirements and expectations. Simultaneously, the Creative team was fielding questions directly about where to find current images, logos, and collateral, adding administrative overhead that took time away from creative tasks.

“At IEHP, Workfront isn't a technology on top of existing process; it's a solution to make existing processes better. It's transforming the way people think about how they work.”

– Michelle Gracey, Application Services Manager, IEHP

The Workfront Solution

IEHP continually strives to get the most value out of everything it has and all that it does, whether it's time, people, resources, or technology. Employees across the organization use Workfront to work smarter, faster, and more efficiently. Workfront project management, reporting, digital proofing, and now digital asset management (DAM) capabilities reduce time-consuming paper and email processes while connecting complex workflows across departments from start to finish—all of which frees employees to focus on higher-value work.

"Workfront's passion for making better project management software has helped IEHP become better project leaders," says Natasha Acosta, Compliance Program Specialist at IEHP.

Streamlined Requests with Custom Forms

For example, IEHP built a new ergonomics request workflow using Workfront custom forms that expedites requests and proactively addresses ergonomic needs. Complete requests can now be handled directly in the system without paper forms and wet signature approval delays.

The Marketing team at IEHP is also using custom forms and request queues to standardize work processes. Strategic, well-thought-out, required request form fields prevent incomplete requests from entering the system, eliminating back-and-forth design and concept questions, as well as rework. The new process is saving more than two dozen Creative team members time while significantly improving their efficiency.

"Brainstorming meetings are now more productive because creatives have everything they need, in a standard format, to get started. When people do get together, they ask more detailed questions and gain better insight to use in concept design," says Gracey. "Workfront has eliminated time previously spent on communications clarifying initial requests."

Using Workfront's digital proofing capabilities, the Creative team continues to accelerate project review cycles. Automated asset approvals are ideal for faster reviews while also documenting who and when feedback was entered, as well as when approval was granted. The newly deployed Workfront DAM is also expected to save time. It will provide employee and vendor requestors with self-service access to approved brand assets (e.g., logos, email signature files, collateral, and more), reducing administrative tasks so the Creative team can focus on its creative work.

“Workfront gets everyone out of email. Its collaboration features make employees more accountable to one another.”

– Dawn Cejudo, Senior Application Support Specialist, IEHP

“I found that Workfront has helped the team stay informed on tasks that need attention and helps us collaborate more effectively. Our Creative staff especially enjoys the online proofing features.”

– Lydia Purkey, Senior Communications Coordinator, IEHP

Improved Internal and External Collaboration

Purchasing relies on Workfront as its primary collaboration platform, ensuring when requests are made, tasks are communicated and tracked as part of cross-departmental work. Legal, as required by the Governing Board, is also included in workflows, using Workfront to approve requests that traditionally had come through emails with less context and turnaround-time guidance. Today, the organization uses a queue system with custom forms in Workfront that flag requests for rapid resolution. Longer term, IEHP expects additional workflows involving compliance requirements to be executed, tracked, and archived in Workfront for time stamping and audit purposes.

"Workfront has enabled innovation in the Purchasing Department, allowing us to capture continuous improvement metrics such as productivity, turnaround time, aging inventory, and quality. These metrics have resulted in exceeding intradepartmental goals on a daily basis, faster communication between departments, and the ability to easily create printable graphs," says Riley James, Procurement Contract Specialist at IEHP.

IEHP is among a growing group of businesses extending Workfront to external vendors for even greater process consistency and efficiency. Project managers no longer have to spend time translating vendor plans from SmartSheets or Microsoft Project into Workfront projects because vendors are required to enter and keep tasks and documents updated in IEHP's Workfront instance, a change that has improved visibility, encouraged collaboration, and streamlined reporting.

"We are managing more than 50 vendors working on projects in Workfront and that's increased engagement and communication with external teams while at the same time eliminating data-entry time internally. Workfront is now a requirement for our vendors and it's working great. There are no more side or lost conversations," says Dawn Cejudo, Senior Application Support Specialist for IEHP.

Improved Transparency with Custom Reports and Dashboards

Workfront dashboards and custom reporting capabilities give IEHP leaders real-time insight into projects and their status. In seconds, IEHP employees can show progress as well as who is working on what tasks and when, and access to this data is easily controlled via permissions, roles, and sharing functionalities within the system.

“Every day there seems to be a new project or issue that needs to be addressed ASAP. Workfront helps provide stability and clarity to my work day. I know exactly what’s pending, and what needs my attention right away.”

– Hector Garcia, Special Programs Manager, IEHP

"Reporting is really important at IEHP, and Workfront reports allow team members to give just the right amount of information to our leaders and teams," explains Gracey.

Benefits

Since 2015, IEHP has consistently seen 20% Workfront user growth. Recently, it rose to nearly 30% as strategic conversations with business units progress faster and more workflows and processes move from paper into Workfront. Today, IEHP's nearly 1,000 users and 1,300 requestors use Workfront daily, as the company improves processes with Workfront and achieves the following benefits:

- **Reduced ergonomic assessment processing time from 4 weeks to 24 hours** – IEHP used Workfront to streamline its ergonomics assessment and equipment delivery process, centralizing communications and automating previously email and paper-based workflows. "Team members are more comfortable sooner and we now have real-time data, which has made it possible to inventory popularly requested items, all because we improved the request process," Gracey says. "HR completes 25–50 assessments per month, so that's a significant time savings."
 - **500%+ improvement in ability to deliver on SLA** – Now that the Purchasing and Accounts Payable teams collaborate directly in Workfront, the combined team's ability to meet an established four-day, SLA has increased dramatically—from 14% to 96%. The teams have quickly and successfully resolved more than 400 issues since workflow inception in early 2018.
 - **15–20% efficiency in marketing** – The Marketing team reports it has gained 15–20% efficiency since moving to Workfront
- from the company's previous project intake application. Marketers expect to realize even greater efficiency in the near future as they continue to test different workflows and make other enhancements.
- **Increased insight and visibility** – IEHP can now quantify work for units collaborating in Workfront, giving its leaders data to justify staffing requests and employees' visibility into who has been allocated for which projects. "We knew employees on the floor worked hard, but with no way to track it, there was no way to quantify it. Visibility has changed with Workfront. There are so many ways to use the data that we're getting out of Workfront," Gracey says.
 - **Increased accountability** – Transparency encourages action at IEHP. Where before emails might be bypassed, nothing is missed in Workfront. According to Gracey, "Workfront isn't just a project management tool; it's a work management tool that adapts to the way people and groups do their work."
 - **90–95% reduction in asset discovery time** – IEHP will use the Workfront DAM to give employees and vendors what they need, on demand, from the company's brand portal. The solution will replace an existing difficult-to-use shared directory and multiple folder layers with simple, self-service access.
 - **More productive meetings** – Employees across IEHP departments are now using the operational system of record to conduct meetings because Workfront offers an easy way to set agendas, review open tasks and issues, and eliminate roadblocks. "Some of our newest Workfront users are from departments that exported Excel documents and posted them onto weekly huddle boards, before going back to update the system later. Now, they have

Workfront open in huddles, updating tasks as they go. That reduces rework and saves them time," notes Cejudo.

- **Breaking down organizational silos** – There's less tension among IEHP teams because Workfront supports collaborative work processes with complete visibility. The solution has enabled previously siloed groups to become one work team, even though they have different functions. According to Gracey, "Employees are getting more work done together, efficiently and productively."
- **More empowered employees** – With Workfront, pushing boundaries to make a greater impact at work is becoming common. For example,

a one-time Project Manager who saw early value in moving employees from email and manual processes into Workfront has moved into a more strategic Application Specialist role, helping to optimize organizational processes through automated workflows.

With roughly half of IEHP on Workfront already and usage growing, the company expects to see visibility increase and connections grow even stronger. "I envision a map in Workfront, connecting all of our work teams and workflows across the organization. It's coming and it's going to be amazing," concludes Gracey.