

Optimized WFM Technology and Processes for Leading Healthcare Provider

Standardized workflows, maximized tools, and reduced manual effort by nearly 50%

Projected Savings: Quarter of a Million Dollars

About the Client

A leading healthcare provider operating throughout the United States and internationally delivers life-sustaining treatments for patients with chronic conditions. In a highly regulated healthcare environment where accuracy and compliance are paramount, the organization partners with hospitals and physicians to improve patient outcomes. It continually invests in integrated care programs, clinical research, and advanced technologies to enhance care quality and strengthen overall health management.

Client Challenge

The organization's workforce management (WFM) team managed forecasting across multiple business units, but each unit approached the process differently. Team members relied on a mix of technologies, inconsistent measures of success, and individual workarounds. This lack of standardization led to forecasting inaccuracies, particularly during periods of low volume and in smaller teams. Forecasting variance would often exceed 20%. Additionally, when team members left the organization, business continuity suffered.

COPC Solution

COPC Inc. was engaged to bring alignment and consistency to the forecasting process. The approach included:



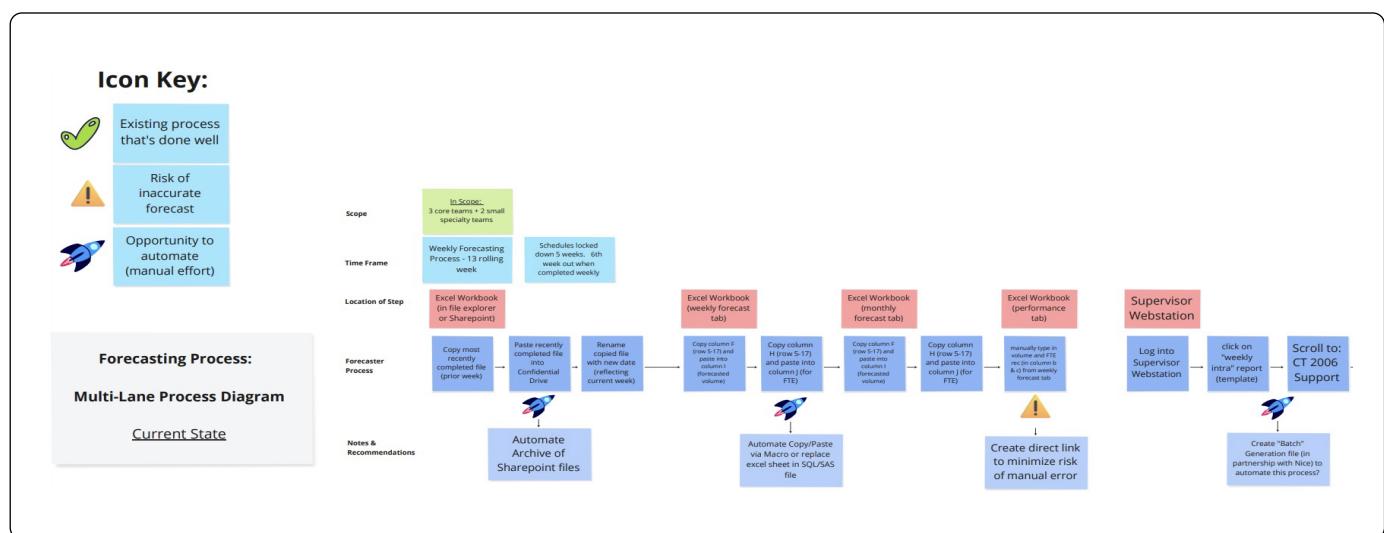
Process Discovery: Meeting with each WFM forecaster, observing their workflows, and capturing how forecasting was performed across business units.



Process Blueprinting: Creating a full multi-laned process map of existing processes, clearly showing each step, system, and potential failure point.

Current State Process Map

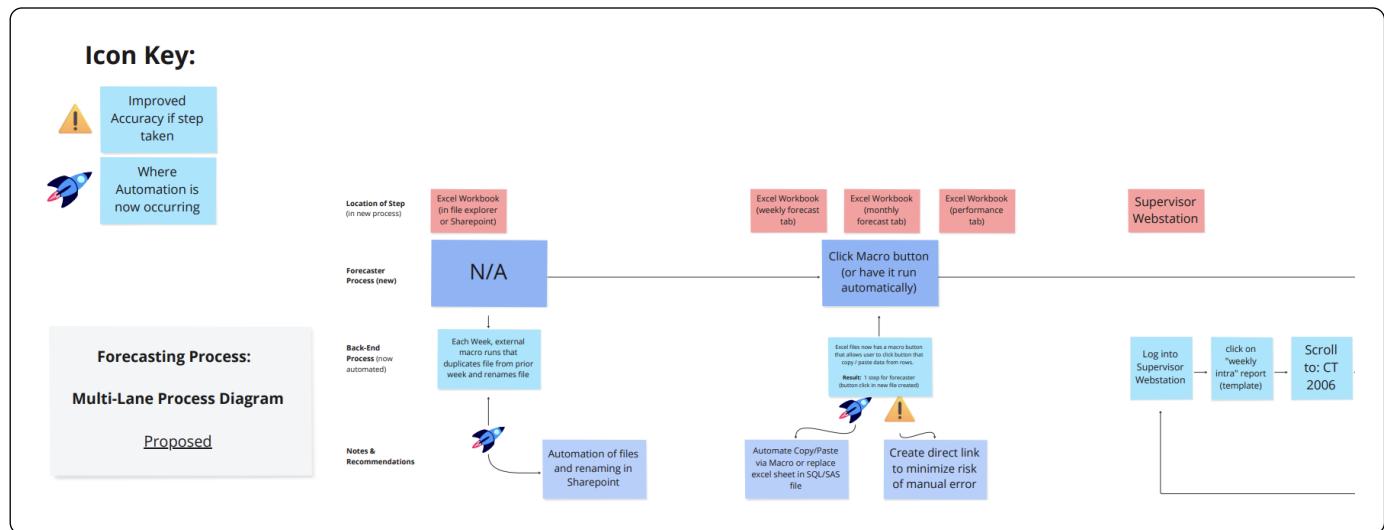
The current state process map illustrates the process the client used when COPC was engaged. This process lacked consistency and control due to multiple manual inputs, leading to unnecessary risks that affected operations and patients.



Recommendation

Future State Process Map

The recommended process map shows how COPC updated the process to incorporate technology and tool optimization, automating several steps. This mitigates the risk caused by manual entry while maintaining a patient's first focus.



*The image is a snippet of the process map and does not represent the entire process.

Group	Approach	# Steps (Current)	# Steps (Future)
Large team	WFM Software CX1 / IEX + Excel	52+	~30
Small team	WFM Software CX1 / IEX	~20	

*Also observed separate project tracking processes applicable to all supported teams.



Optimization: Identified opportunities within current technologies and tools to automate repetitive tasks, streamline manual steps, and reduce inefficiencies that impact forecast quality without additional spending or investments.



Alignment: Defined a unified forecasting process to standardize practices across all teams, improving continuity and scalability.



Knowledge Transfer: Delivered a consolidated process map, summary of findings, and recommendations to WFM leadership for adoption.

Results

The project delivered measurable improvements and set the foundation for future efficiency gains:



Standardization Across Units: Consolidated three different forecasting processes into one unified approach. This reduced manual effort by 50%, driving consistency and scalability.

Projected Savings: **\$50,000**



Efficiency Gains: Optimized the client's technology stack and WFM tools by automating critical manual steps. These enhancements streamlined intraday and scheduling processes, reducing manual workload by up to one full-time equivalent (FTE), and improving overall operational efficiency.

Projected Savings: **\$80,000**



Business Continuity: Created a single process that supports documentation, knowledge sharing, and continuity in the event of staff turnover.



Downstream Benefits: While long-term results are still emerging, the aligned process is expected to reduce overtime, optimize staffing levels, and enhance customer experience through more accurate forecasting.

Projected Savings: **\$120,000**

This engagement shows how aligning technology with process design delivers measurable ROI. By simplifying forecasting and reducing manual effort, the client gained not only efficiency but also greater resilience, scalability, and a foundation for improved customer experience.

About COPC Inc.

COPC Inc. provides consulting, training, certification, benchmarking and research for operations supporting customer experience. The company created the COPC Standards, a collection of performance management systems for customer experience operations, customer experience management, vendor management and procurement.

Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations to deliver a superior service journey. COPC Inc. headquarters are in Winter Park, FL, U.S., with operations in Europe, the Middle East, Africa, Asia Pacific, Latin America, India and Japan.
