



## Success Story: Post Investment Transformation

**Client Classification:** US Dental Chain

**Service Category:** Business Acquisition, Integration, & Divestiture, Operational Strategy, Performance Management, Technology Enablement

### Situation:

A Private Equity firm needed a plan for scaling a Dental Chain, and a “Playbook” for an aggressive acquisition strategy. The base business was disorganized and needed a growth platform, process and service redo and technology roadmap to facilitate rapid growth.

LoBue conducted a comprehensive analysis, redesign, and implementation initiative for the organization, covering all process, billing, and service operations. A technology roadmap was developed for facilitating growth. Additionally, a comprehensive “playbook” for evaluating and pricing acquisitions was developed. The “playbook” included integration planning and execution for all new acquisitions.

### Recommendations:

- Redesign Billing and collections systems and procedures to eliminate backlogs and dramatically reduce collection cycle times.
- Implement a workforce utilization model which matches resources against daily appointment schedules.
- Improve key operations processes for maximizing efficiency and reducing turnaround times in appointment setting, billing inquiries, and oral surgery schedules.
- Redefine organizational model to support business scaling and subject matter experts in critical jobs.
- Define a daily performance measurement and management MIS process to insure timely execution and client services.
- Develop a tactical technology strategy for filling critical capability voids and leveraging existing investment.
- Develop a “playbook” that measures acquisition candidates against a success model. Include acquisition Metrix and post-acquisition integration plans.

### Workforce Optimization

- Designed and implemented a cross-functional multi-skilling model across select voice-based processes to more effectively manage real-time Agent utilization during intra-day and intra-month volume peaks and troughs, as well as to allow for call volume queue overflow.
- A process complexity and skills requirements analysis were performed to ensure multi-skilling across like processes. Total cross-trained staff across the impacted

#### OFFICE LOCATION

6550 SOUTH PECOS ROAD  
SUITE 116  
LAS VEGAS, NV 89120  
UNITED STATES

P: 702.898.6940  
F: 702.433.4021  
E: INFO@LOBUE.COM

processes exceeded 40%. Implementation resulted in a 30% increase in Agent utilization.

- Established a service ambassador function for high volume clinics to ensure client handling and services were meeting standards and to provide real-time reaction to changing client flows and needs.
- Rationalized, standardized, and centralized resource planning for all voice and data-based processes and shift schedule design. Desktop procedures were developed for each function to ensure on-going management and standardization of the methodologies employed.

## **Process Improvement**

- Redesigned all billing and collections procedures and staffing to dramatically reduce past due receivables and improve day or service co-pays.
- Standardized the Customer experience by delivery channel to eliminate unnecessary and inconsistent activities between voice and online services. Additionally, implemented e-mail and fax alternative channel delivery options for processing of bulk appointment reminders previously handled by Agents via the telephone.

## **Organizational Alignment and Staffing Enhancements**

- Developed and implemented “Centers of Excellence” to facilitate the centralized support of: 1) Business Analysis / MIS / Capacity Planning; 2) Quality Assurance and the Customer Experience; and, 3) Training and Development. Implementation resulted in enhancements to the organization’s ability to more effectively leverage best practices, create ownership for the utilization of world-class methodologies, and standardize delivery of support function services.

## **Performance Measurement and Management**

- Standardized and enhanced the performance measurement, including definition of Key Performance Indicators designed to drive appropriate staff behavior and development of scorecard / dashboard reporting. Additional objectives included the following:
  - Improvement in the availability and quality of information needed to drive management decisions, especially for new clinic integration.
  - Leveraging of new performance metrics, including analysis of intra-day and peak time performance versus merely reporting end-of-day and monthly averages.
  - Definition of “early warning signals” for potential threats to performance, including spikes in clinic visits.
- Conducted a call center benchmarking analysis against the Purdue University (U.S.) Benchmarking Database to identify major performance and operational gaps and identify solutions for implementation. Activities included facilitation of internal data collection activities and definition of desired peer groups for comparison and analysis.



## Results:

The initiative resulted in a comprehensive operating model, with post acquisition integration processes. Acquisition candidates that did not fit the model were avoided thereby eliminating a past investment issue. Facilities were successfully re-engineered and processes, service delivery and billing were dramatically improved. The revised operations were prepared for successful scaling of the business.