



REAL-WORLD BUSINESS INTELLIGENCE
CONSULTING PROJECT.

Claims Management Performance

“Tracking Claims Intake, Review, and
Completion for Vanguard Healthcare”

Presented by

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Project Overview

Company Background:

Vanguard Healthcare is a startup scaling quickly, requiring better claims tracking.

Project Goal: Build a Power BI dashboard to enhance visibility into claims processing, customer satisfaction, and performance metrics.



Introduction

Vanguard Healthcare is a fast-growing startup that needed better visibility into their claims intake, review, and completion process. As they scale, having a clear understanding of key metrics like claim resolution timelines, employee performance, and customer satisfaction is crucial for ensuring efficiency and improving their service.

The goal of this project was to create a Power BI dashboard that empowers their Claims Resolution Team to track these processes more effectively.

Over the course of the project, I focused on transforming the raw claims data into meaningful insights through interactive visualizations, KPI tracking, and performance analysis — all aimed at helping Vanguard make data-driven decisions.

In the next few slides, I'll walk you through the data preparation process, the structure of the dashboard, the insights uncovered, and future opportunities for enhancing the report. Let's dive in!

How Dashboard Works



01 Overview Dashboard

- Provides a high-level summary of key performance indicators (KPIs) like total claims, completed claims, pending claims, average resolution time, and satisfaction scores.
- Visualizations like bar charts and pie charts help break down claims by status and priority at a glance.

How Dashboard Works

02 Claims Analysis Page

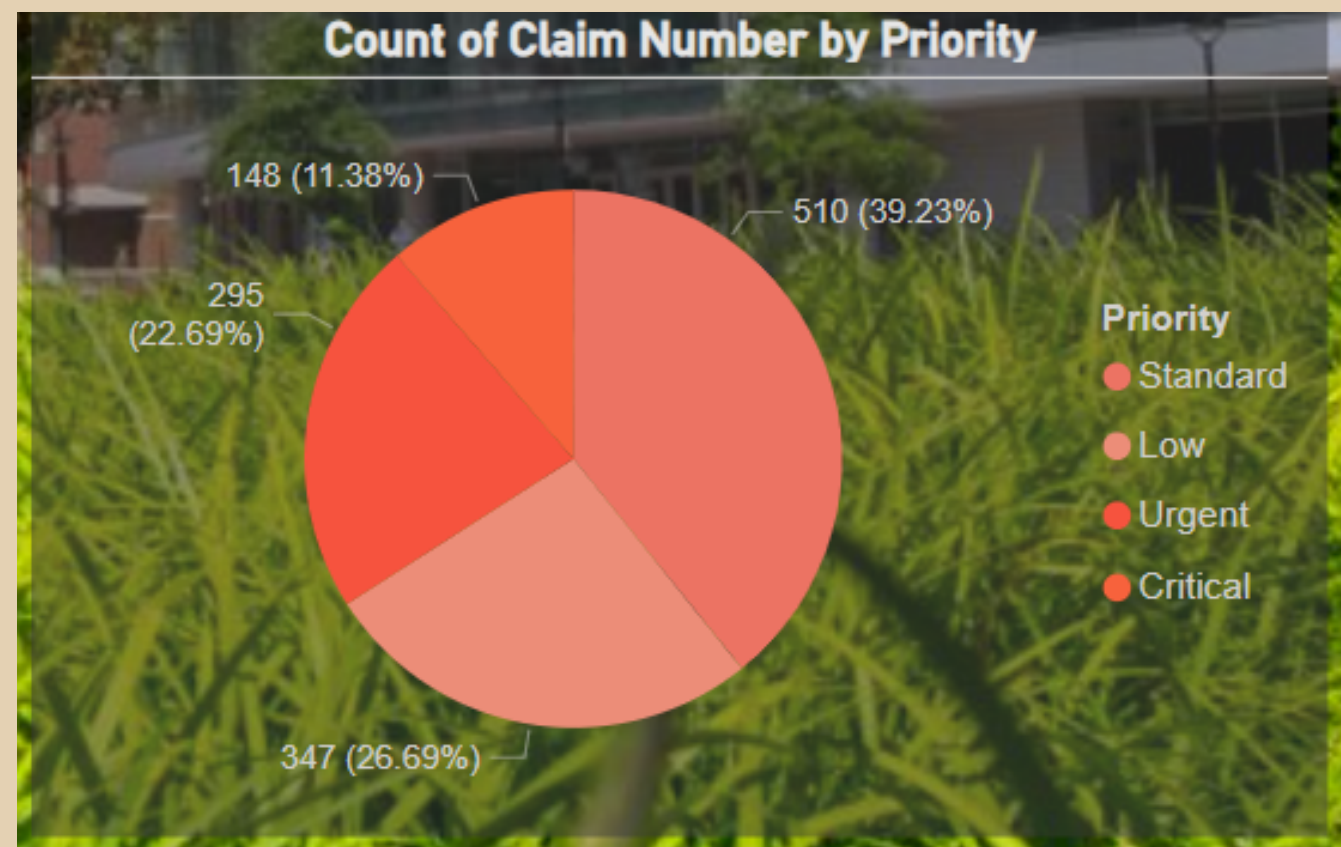


- Allows a deeper dive into claims data, showing trends over time and breaking down claims by request type.
- A detailed claims table offers a filterable view for tracking individual cases, and a date slicer helps narrow the analysis to specific periods.

☀️ 1. Claim Volume and Status Trends:

- Total Claims: Highlight the total number of claims processed over the period to show the overall workload.
- Peak Claim Periods: Identify months with the highest claim submissions to pinpoint busy periods.

Why it's important: Helps management understand workload trends and identify when extra resources might be needed.



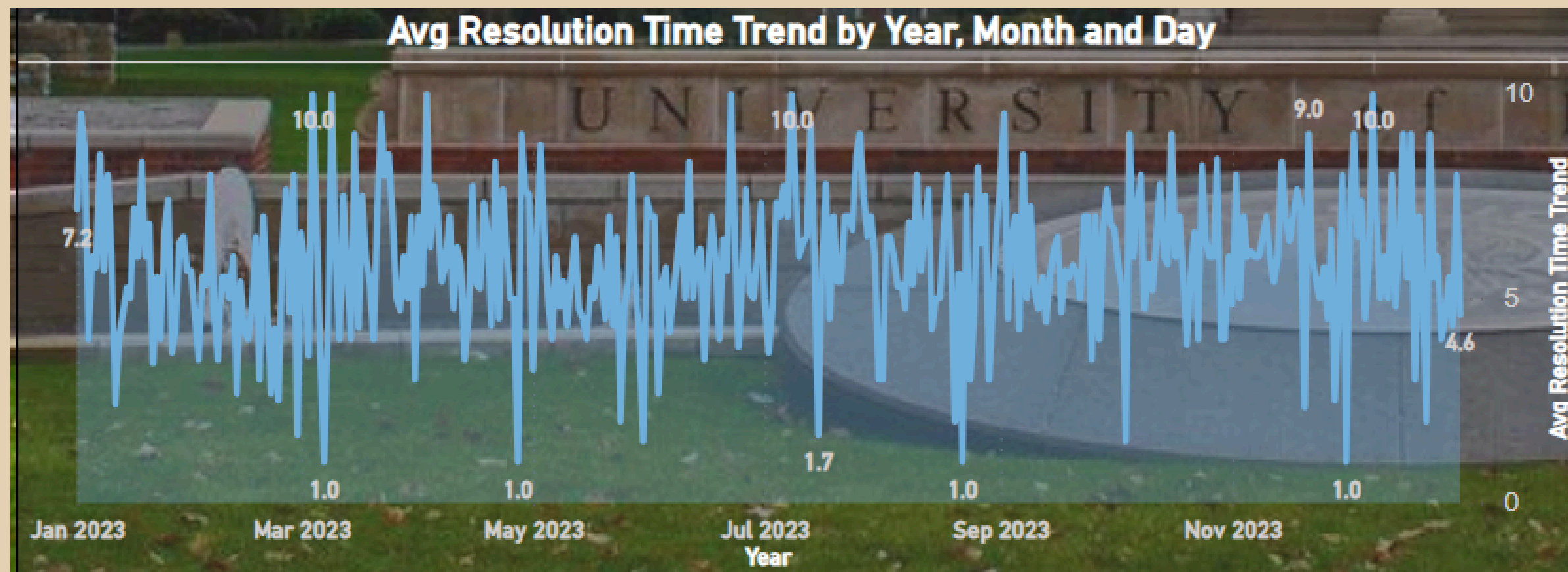
5.81
Avg Resolution Time

1300
Total Claims

☀️ 2. Resolution Time Analysis:

- Average Resolution Time: Present the overall average time to resolve claims.
- Trends Over Time: Show whether resolution times are improving or worsening month over month.

Why it's important: Provides insights into process efficiency and highlights any delays that need to be addressed.



☀ 3. Employee Performance Insights:

- Top Performers: Identify employees handling the most claims and resolving them the fastest.
- Satisfaction Scores: Highlight employees who consistently receive higher satisfaction ratings, suggesting best practices that others could adopt.

Why it's important: Helps recognize top performers and identify employees who may need additional support or training.



4. Customer Satisfaction Analysis:

- Overall Satisfaction: Show the average satisfaction score and how it correlates with resolution times.
- Score Distribution: Highlight the proportion of claims rated as "Excellent" vs. "Terrible" to assess overall service quality.
- Employee Impact: Identify employees with the highest satisfaction scores, indicating strong customer service skills.

Why it's important: Measures customer perception of the claims process, guiding improvements to boost satisfaction.

Result

- Claims Overview:

Processed a total of 1300 claims from January 2023 to early 2024.

- Resolution Time:

The average resolution time is 5.81 Days.

- Employee Performance:

Some employees consistently received higher satisfaction scores, indicating effective communication and resolution strategies.

Conclusion

Process Efficiency: The current claims resolution process is effective but shows signs of strain during peak periods, leading to slower resolution times and an increase in pending claims.

Employee Performance Variability: Performance varies significantly across employees, with a clear gap between top performers and those requiring additional support.

Customer Experience: Faster resolutions generally result in higher satisfaction, indicating that customers value prompt service. However, urgent claims aren't always prioritized effectively.

Recommendation

Optimize Workload Distribution:

Assign more resources during peak claim periods to prevent backlogs and reduce resolution times.

Prioritize Urgent Claims:

Implement a system to flag and fast-track urgent claims, ensuring they're addressed promptly.

Employee Training:

Provide targeted training for employees with slower resolution times and lower satisfaction scores.

Thank
You