



## Microsoft Customer Solution Healthcare Industry Case Study



**Customer:** Independence Blue Cross

**Web Site:** [www.ibx.com](http://www.ibx.com)

**Customer Size:** 9,400 employees

**Country or Region:** United States

**Industry:** Healthcare

### Customer Profile

Independence Blue Cross is a leading health insurer based in Philadelphia, Pennsylvania. It provides coverage to nearly 3.4 million people and has 9,400 employees.

### Software and Services

- Microsoft Office
  - Microsoft Office SharePoint Server 2007

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## Insurer Creates Center of Excellence to Optimize Collaboration, Meet Compliance Needs

“We’ll utilize enterprise search capabilities in SharePoint Server in entirely new ways... It will make us far more effective in servicing our members and may assist in new service areas.”

Greg Barnowsky, Chief Architect, Enterprise Content, Independence Blue Cross

*To boost return on investment as it upgraded to Microsoft® Office SharePoint® Server 2007, Independence Blue Cross created a five-person Center of Excellence that provides best practices, accelerates deployment, and manages site growth. The COE is helping the company to make full and effective use of enterprise search, to reduce costs and boost efficiency by moving off Lotus Notes, and to increase its security for collaboration sites.*

### Business Needs

As it grew to include 3.4 million members across five Philadelphia-area counties, health insurance provider Independence Blue Cross faced some of the same challenges in information sharing and collaboration that are familiar to many large companies.

For instance, employees could post documents to the company’s intranet, but other employees might not be able to find those documents, in part because there was no consistent way to conduct enterprisewide searches for information without granting

broad access rights. To work around this, employees exchanged documents in e-mail, which resulted in multiple versions of documents in multiple locations. Without predictable locations for the storage, audit, and protection of records, the company expended significant effort to comply with privacy and retention regulations.

Technology projects used shared drives as a mechanism for sharing information, running the risk of losing documentation to inadvertent deletion or overwriting.

In addition, there was no automated way to

archive or close older sites when they were no longer needed, so they continued to consume valuable space on the Independence Blue Cross intranet.

Independence Blue Cross had adopted Microsoft® Office SharePoint® Portal Server 2003, which had made it easier for employees to share documents and work together, but its use was limited to a few groups. When Office SharePoint Server 2007 became available—with enhanced abilities for content management, workflow, enterprise search, intelligent forms, business intelligence, and enterprise portals—company executives understood that it could address many of their concerns without the complexity of implementing and managing multiple solutions.

But they also understood that technology alone wasn't the answer. "We were not using SharePoint Server 2003 in a consistent way, and it showed in the problems we had in finding and using information," says Greg Barnowsky, Chief Architect of Enterprise Content at Independence Blue Cross. "I'd seen this sort of problem at other companies. We knew that as we upgraded to SharePoint Server 2007, we needed a better way to implement it."

## Solution

Before implementing Office SharePoint Server 2007, Independence Blue Cross created a Center of Excellence (COE), an office that would both administer best practices for the software and provide support to facilitate the software's adoption.

The COE's best practices include monitoring sites and considering those that haven't been accessed in 90 days as candidates for retirement and archiving. That practice keeps unused sites from bloating the Independence Blue Cross intranet and

consuming disk space, or orphaning information that is no longer in use due a change in project direction.

To speed awareness and adoption of Office SharePoint Server 2007, the COE looked for high-profile projects that could earn executive sponsorship. One of the first projects to move to the 2007 version of the software was the publication of contract and benefit booklets for members. The company used Office SharePoint Server 2007 as an enterprise documentation repository for document versioning control and life-cycle management and to provide access to electronic versions of its benefits booklets, which in the past had been printed documents only. The COE has also targeted revamping the company's intranet and legacy Lotus Notes implementations for migration to the Office SharePoint Server installation to reduce redundant technologies and save money.

The COE operates with a staff of five professionals, reassigned from other areas within the IT department of Independence Blue Cross. "It's not a large staff, but that means we didn't need a large budget to get the COE off the ground," says Barnowsky. "That made it a relatively easy sell within the organization."

## Benefits

By implementing a Center of Excellence along with its upgrade to Office SharePoint Server 2007, Independence Blue Cross is achieving its goal of making highly effective use of the software, according to Barnowsky.

"Instead of leaving each department or team to its own devices, we have centralized expertise in the COE that facilitates every phase of SharePoint site design and deployment," he says.

The creation of a consistent site structure will enable Independence Blue Cross to make full and effective use of enterprise search, according to Barnowsky. "We'll utilize enterprise search capabilities in SharePoint Server in entirely new ways," he says. "For example, we're looking at using enterprise search as an application in itself, to enable in a secure fashion member services or other company associates to obtain comprehensive information about a member—what program the member is on, which group he or she belongs to, how many claims the member has filed, what contract and booklet information is related to the member—just by doing a search. It will make us far more effective in servicing our members and may assist in new service areas such as our consumerism initiatives."

The COE is driving other innovations with Office SharePoint Server 2007, according to Barnowsky. The company has partnered with a local Microsoft Gold Certified Partner, RJB Technical Consulting, to assist the COE in achieving in-depth SharePoint Server 2007 expertise quickly. This partnership has been instrumental in helping the company's Strategic Initiatives Group to use the software's workflow technology to automate the cost-benefit analysis of proposed initiatives. The COE is using both external and internal expertise to help the company to reduce costs and boost efficiency by moving off Lotus Notes, redesigning its intranet Web sites, and reducing redundant tool sets. Finally, the COE is helping to ensure more robust security for collaboration sites by providing best practices for security and governance.