Case Study

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What if you could?

Creative Benefits Administrators
Case Study | BPO

TPA Leverages BPO for Efficiency, Growth, and Expertise

Introduction

Creative Benefits Administration is a fast-growing benefits administrator based in San Antonio, Texas, for which DataPath BPO has proven to be a genuinely transformative partner.

"The availability of DataPath BPO has been critical to achieving our ambitious growth goals without overwhelming our resources," says Jeremy Sakulenzki, CBA president.

Challenges

CBA faced several challenges that led to their decision to access comprehensive BPO services.

1. **Systems Integration:** CBA needed seamless integration with various benefit administration and payroll systems. However, this would significantly increase team workloads and likely require additional technology investments.

2. **Resource Allocation:** CBA wanted to keep employees focused on client-facing activities such as phone calls, emails, and group discussions of plans rather than on back-end processes.

3. **Data Processing:** Handling incoming files with significant data manipulation needs was daunting. CBA regularly received client files containing 10,000-20,000 lines of data that required excessive personnel hours to reconcile.

4. **Operational Peaks:** Due to the nature of the benefits administration business, specific periods of the year produce substantially higher work volume. CBA needed to scale up and down efficiently on a seasonal basis to avoid overwhelming staff and control overhead.

5. **Long-Term Scalability:** As their business expanded, CBA often found themselves needing to scale up their operations before profitability justified hiring new employees.

Solutions

DataPath BPO provided CBA with substantial expertise and services to address the challenges that were restricting their ability to operate efficiently and grow smoothly.

1. **File Feed Integration:** DataPath BPO processed the file feeds from benefit admin and payroll systems, allowing CBA to work as if they had true integration without having to undertake the financial and time burdens of in-house technology and personnel.

2. **Claims Processing:** DataPath BPO took on nearly all of the TPA's claims processing tasks, significantly reducing in-house workloads and freeing CBA employees to concentrate on client-facing roles.

3. **Data Manipulation:** DataPath BPO began managing and reconciling incoming client files with large data sets, saving countless hours each month and ensuring high accuracy.

4. **Scalable Staffing:** Starting with a minimal number of full-time equivalents (FTEs), CBA was able to increase its BPO resources incrementally during high-volume months and as needed to address long-term business growth.

5. **Process Improvement Suggestions:** In addition to their work output, DataPath's BPO team offered CBA various recommendations for process improvements based on the team's extensive experience in the benefits industry.

Results

Sakulenzki credits CBA's decision to incorporate DataPath BPO into their daily operations as "one of the best business moves we've ever made." Here's how he describes the results of their working relationship.

Enhanced Customer Service

Outsourcing back-end processes has improved CBA's customer service. "Our staff can focus on direct client interactions and give much more personal attention, which helps set us apart."

Cost Efficiency

"Training our DataPath BPO team on our preferences and on tasks that may be unique to our operation involves much less overhead and stress than managing a large in-house staff."

Accuracy and Reliability

DataPath BPO's handling of complex data manipulation tasks has been fast and accurate. "I cannot tell you how many personnel hours we save monthly from this work alone."

Flexibility and Scalability

"The ability to adjust our BPO usage in small increments (e.g., 0.25 FTE) and scale according to demand has allowed us to grow without the immediate need for new hires. We expect to double, if not triple, our FTEs over the next year."
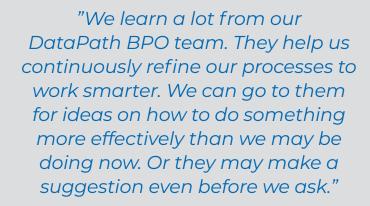
Continuous Improvement

"We learn a lot from our DataPath BPO team. They help us continuously refine our processes to work smarter. We can go to them for ideas on how to do something more effectively than we may be doing now. Or they may make a suggestion even before we ask."

Rapid Response

"On the rare occasion that an error is found in their work for us, DataPath BPO addresses and fixes the issue immediately. Their standard of service is excellent."

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– Jeremy Sakulenzki, president

Takeaways

- DataPath BPO has been an indispensable partner in CBA's rapid growth. Their expertise, flexibility, and proactive approach have helped CBA significantly enhance operations while controlling costs.

- From integrating with benefits administration and payroll systems to handling extensive data processing, DatPath BPO has allowed CBA to better focus on client-facing tasks and significantly improve their efficiency and accuracy.

- By handling critical backend processes, DataPath BPO has enabled CBA to maintain a lean staff while scaling efficiently. CBA is able to handle seasonal workloads and achieve long-term growth objectives without the burden of maintaining a large in-house team.

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