In response to healthcare reforms, many healthcare organizations are seeking to provide a higher quality of care and better patient outcomes while using fewer resources, retaining effective talent, and improving operational efficiency. Starting in the 1990s, Intermountain Healthcare’s leadership took a strategic look at the organization’s data in an effort to improve quality and efficiency.

In 2000, Intermountain created an analytics function within its human resources team and set a goal to use data to influence talent management decisions. Since its inception, the team has evolved its capabilities to effectively inform the company’s decision-making processes, using data to uncover areas where quality and productivity can be improved, leading to better resources for patient care.

In this case study, we:

- Examine how Intermountain structured its analytics team to become a valuable support for the organization’s business functions
- Explore how the analytics team collaborates with stakeholders to foster actionable insights for executives and leaders
- Study how the analytics team utilized various data tools in its analytics projects to better engage stakeholders and promote discussion around solutions
- Share examples of Intermountain’s analytics team’s impact on the organization
The Bersin WhatWorks® Membership Program

This document is part of the Bersin Research Library. Our research is provided exclusively to organizational members of the Bersin Research Program. Member organizations have access to an extensive library of learning and talent management related research. In addition, members also receive a variety of products and services to enable talent-related transformation within their organizations, including:

- **Research**—Access to an extensive selection of research reports, such as methodologies, process models and frameworks, and comprehensive industry studies and case studies.

- **Benchmarking**—These services cover a wide spectrum of HR and L&D metrics, customized by industry and company size.

- **Tools**—Comprehensive tools for HR and L&D professionals, including tools for benchmarking, vendor and system selection, program design, program implementation, change management, and measurement.

- **Analyst Support**—Via telephone or email, our advisory services are supported by expert industry analysts who conduct our research.

- **Strategic Advisory Services**—Expert support for custom-tailored projects.

- **Member Roundtables**—A place where you can connect with other peers and industry leaders to discuss and learn about the latest industry trends and leading practices.

- **IMPACT Conference: The Business Of Talent**—Attendance at special sessions of our annual IMPACT conference.

- **Workshops**—Bersin analysts and advisors conduct onsite workshops on a wide range of topics to educate, inform, and inspire HR and L&D professionals and leaders.

For more information about our membership program, please visit us at www.bersin.com/membership.
Contents

Company Overview 4
Business Environment and Challenges 5
HR Organization 6
  A Journey toward the Talent Analytics Function 8
  Current Analytics Team Structure 8
  Skills Training for the Analytics Team 9
Tools and Technology 10
The Analytics Team’s Consultative Approach 12
Data Challenges and Resolutions 14
Business Impact 15
  Project 1: Wellness Initiative 15
  Project 2: Standardizing the Learning Function 19
  Project 3: Reducing Turnover and Costs 21
Lessons Learned and Leading Practices 25
Next Steps 26
Conclusion 27
Appendix I: Topics for Discussion and Learning 28
  Key Learnings 28
  Ideas for Action 28
  Questions to Consider 29
Appendix II: Table of Figures 30
About Us 31
Company Overview

Intermountain Healthcare is a nonprofit healthcare organization based in Salt Lake City, Utah, serving Utah and southeastern Idaho (see Figure 1). Intermountain was created in 1975 when The Church of Jesus Christ of Latter-day Saints donated its 15 hospitals to the communities they served. Intermountain Healthcare was established as a nonprofit, nondenominational organization to administer these hospitals. The organization is governed by more than 470 local business and civic leaders who serve as unpaid, volunteer trustees. Since its creation, the organization has evolved to become a fully integrated healthcare system that provides comprehensive care through hospitals, clinics, homecare, and an insurance plan. Intermountain cares for patients at 22 hospitals and 185 clinics. Intermountain’s insurance plan, SelectHealth, is one of the largest health insurers in Utah. With more than 1,000 employed physicians and 34,000 employees, Intermountain is the largest private employer in Utah.

Figure 1: Intermountain Healthcare at a Glance

- **Year Founded**: 1975
- **Medical Group**: 1,000 employed physicians and 3,800 affiliated physicians; 34,000 employees; 3,000 volunteers
- **Revenue (2012)**: Approximately $4.9 billion
- **Headquarters**: Salt Lake City, Utah, U.S.
- **Healthcare Facilities**: 22 hospitals and 185 clinics

*Source: Intermountain Healthcare, 2013.*

Intermountain strives to uphold its internal branding and mission as a provider of extraordinary care, which they believe can only be delivered via a balanced approach (see Figure 2). According to Intermountain's assistant vice president of organizational effectiveness and talent management, this balance is a result of the organization’s recognition of the interconnectedness across its functions. Leaders and employees strive for excellence in all areas to provide such extraordinary care to their patients and the communities they serve.
Business Environment and Challenges

In light of today’s sweeping governmental healthcare reforms, Intermountain must continuously examine its own practices to maintain the highest quality of patient care while also managing its workforce to create greater efficiency and productivity. Intermountain is currently working on a shared accountability strategy, an approach based on improving quality to deliver excellent patient care, optimizing the health of those it serves, and involving patients by engaging them in their own healthcare, all while managing costs. In short, this strategy focuses simultaneously on better healthcare, more involved patients, and lower costs. As part of this transition, Intermountain is increasing its attention on disease prevention and maintaining wellness.

As a private insurer, Intermountain has the added accountability of providing healthcare and services to its customers and employees.

Over the last few years, Intermountain’s organizational changes have impacted how it manages operations and conducts business. The organization has moved toward a goal of enabling the various hospital campuses to act as a single system by centralizing shared services and integrating resources.
In the face of these external and internal changes, the leaders at Intermountain are striving to maintain the organization’s quality of care and cultural values. Working with the firm belief that their organizational data could bring insights and value to their decision-making, Intermountain began to build an analytics team within their human resources function during the 1990s. This team explores and analyzes human resource data to facilitate organizational decision-making and considers how employees will be impacted by these decisions.

HR Organization

Intermountain’s HR organization has gone through major transitions in the last several years. HR analysts have moved away from merely generating reports and responding to information requests. They now serve in an elevated role, using more advanced skillsets to work at a more consultative level with HR business partners and business leaders in the organization. Aligned with the organization’s overall strategy to increase both the quality of its care and its efficiency, the HR analytics team provides actionable data insights for executives and leaders.

Intermountain’s analytics function sits within the HR analytics and technology department (see Figure 3). The analytics and technology department is composed of the following four teams:

1. **HR analytics.** Responsible for enterprisewide analysis and reporting of HR data
2. **Talent management systems.** Responsible for systems strategy and technology management for recruiting, performance management, succession planning, and compensation
3. **Human resources management systems.** Responsible for systems strategy and technology management for the core HRMS and benefit systems
4. **Ancillary HR systems teams.** Supports miscellaneous HR functions, performs audits, and supplies call-center support for HR staff in the field

While it is not typical for the analytics and technology teams to reside in the same department, this structure serves as an advantage for Intermountain. Bersin by Deloitte’s research shows that having strong ties to technology teams is one of the main drivers for a successful analytics function.¹

The HR analytics team reports to the director of analytics and technology, who in turn reports to the vice president of HR. The analytics team often partners with the managers of other departments in the analytics and technology function on projects such as managing data imports into the data warehouse. In addition, the analysts provide support to HR as a whole and partner with regional and central HR leaders on projects involving recruiting, benefits, retirement, wellness, talent management, education, organizational effectiveness, and compensation.

The director of HR analytics and technology is a member of the HR leadership team and is actively involved in HR planning and goal-setting. The director supports HR leadership to plan for resource allocation and future goals by leveraging organizational data. For example, the analytics team is charged with creating and managing an HR services dashboard that compares workforce planning metrics such as attrition and retirement rates to national benchmarks, informing HR leadership as they develop strategic planning.

KEY POINT

Having strong ties to technology teams is one of the main drivers for a successful analytics function.
A Journey toward the Talent Analytics Function

The analytics function at Intermountain began in 2000 with the goal of supporting decision-making with data insights. Since then, the team’s structure has gone through many changes. In the early phases of building the analytics function, the analytics team had a heavy technical focus, building custom analytics and HR applications. While having team members with these strong technological skills was advantageous, the team predominantly spent its time managing systems rather than analyzing data.

Intermountain’s current analytics team structure was influenced by the implementation of a human resources management system (HRMS) and an integrated talent management system (TMS). The transition from homegrown to vendor systems freed up time for the analytics function to dedicate itself to data analysis rather than system management. After going live on the department’s new HRMS system in 2000, the analytics director took on the initiative to centralize the analytics function, enabling an enterprisewide view of data across different functions and collaboration among functional teams with knowledge of different talent data.

This significant shift in the team’s structure was facilitated by centralizing HR data within an existing data warehouse at Intermountain. The data warehouse receives daily data feeds from the HRMS, payroll system, and TMS. With this essential tool, the analysts have reduced their time spent searching for data from 80 percent to 20 percent. With data now easily accessible, the analysts are able to leverage their expertise on multiple projects throughout the organization.

Current Analytics Team Structure

With the leadership and support of the vice president of HR, the department moved away from managing systems and collecting data. The analytics director was now able to build the analytics team by hiring personnel with the skills sets necessary to perform more high-value analytics work. Instead of having one analyst with a wide range of skills sets, the analytics team is now built on three sets of competencies (see Figure 4):

1. Analyst A: HR (subject matter expertise in HR)
2. Analyst B: Technical (technical expertise in systems and automating analyses and reports)
3. Analyst C: Analytical (statistics and analytic models)
The analytics team is composed of one part-time and three full-time analysts, all of whom have master’s degrees. One analyst has an advanced degree in statistics and expertise in data. Another has strong subject matter expertise in HR, as well as experience with translating data into actionable information. The third analyst has a joint specialty in HR and information systems, including expertise in tools that deliver solutions. Because the analysts work together, leveraging each member’s expertise, they must also possess strong interpersonal skills to collaborate on projects. All analysts are involved in each project as a holistically functioning team, with one team member handling the systems aspect, one performing the statistical work, and one lending the HR perspective.

Skills Training for the Analytics Team

Intermountain’s analytics team members are constantly developing and building their skills through multiple avenues, including internal brainstorming sessions, training, and conferences. For example, the analysts have a weekly meeting with the data architects from the data warehouse team. In this weekly meeting, the analysts and data architects collaborate on
projects and take turns providing in-service training to one another on topics related to technical functions, analytical methods, or data visualizations. Over time, analysts from other departments, such as payroll and education, joined the HR analytics team meetings to share ideas.

There is also a monthly meeting in which the team meets with 200 to 300 other analysts at Intermountain to learn about new technology and share ideas. At these meetings, the analysts create working groups on topics such as data visualization technologies and dashboards and changes in the technical structures of the data in the data warehouse. These monthly meetings are a rich source of training as analysts share the expertise that exists within the organization.

Because of the effort invested in the development of the analytics team, Intermountain’s analysts are continuously expanding their effectiveness and capabilities. Over the last few years, the team has made strides toward using more statistical analyses to uncover insights from data. The team is moving in the direction of developing predictive models to identify the business practices that would forecast different talent outcomes, such as turnover.

Tools and Technology

The data warehouse and vendor HR systems that are part of Intermountain’s tools and technology infrastructure provide the organization with access to large amounts of data for analyses and dedicated time for analytics projects. Figure 5 shows the technology infrastructure of the HR organization.

With the amount of data that are imported into the data warehouse daily, the analysts need sophisticated tools to analyze that data and effectively report findings. Though not tied to any particular product, the analysts use tools within the following four categories:

1. Desktop analysis tools such as Microsoft Excel and SPSS
2. Static reporting tools such as Cognos
3. Advanced data visualization tools such as Tableau
4. Custom web visualization tools

Intermountain has found that although desktop analysis tools such as Microsoft Excel and SPSS are useful for initial data analyses, the reports generated with these software programs are not easily scalable or deliverable at the enterprise level. Therefore, in order to communicate data results efficiently and effectively, reporting and data visualization tools are necessary. To enhance productivity, the team uses the Cognos reporting tool to automate frequently requested reports. Currently, the reporting tool autogenerates about 200 reports on-demand for executives and managers, as well as various
functions including HR, learning, benefits, auditing, and compensation. These reports are more transactional in nature, supporting defined needs for data with basic parameter selection. The team typically builds reports when a request involves a few parameters and is needed on a recurring basis. By automating recurring requests, the analytics team is able to spend more time on emerging information challenges.

To present data that are digestible to stakeholders, the team requires a data visualization tool that is capable of transforming complex ideas into interactive and easily understandable formats such as dashboards. Currently, the team uses Tableau for the majority of their visualizations and dashboards. When there are no tools available that can meet the team’s data visualization needs, it partners with IT to develop a custom solution.


**Figure 5: Technology Infrastructure of Intermountain’s HR Organization**

---

**KEY POINT**

By automating recurring requests, the analytics team is able to spend more time on emerging information challenges.
The Analytics Team’s Consultative Approach

The HR analytics team works with many departments in the organization (including various HR groups, finance, research and planning, supply chain, and clinical leadership), playing a consultative role with key stakeholders. Whether for one-time requests for an ad hoc report or for larger projects, the team involves stakeholders throughout the process to determine what their challenges are, how to achieve a solution, how to measure results, and the possible benefits of the solution. The analytics team achieves buy-in because it engages stakeholders in identifying which metrics to track, therefore ensuring the data resonate with stakeholders’ business concerns.

The team actively involves stakeholders when designing analytics tools and developing region-specific reports to maximize audience engagement. To strengthen relationships with its stakeholders, the team travels to different Intermountain regions and meets regularly with regional HR business partners. Their conversations typically revolve around the value that dashboards and tools can bring to the regional functions, patterns and trends that have been detected in regional data, possible solutions to any issues that have been identified, and any business concerns at the regional level.

Additionally, the analysts occasionally spend days “job-shadowing” with HR business partners to help the analysts understand their needs, as well as to motivate the HR business partners to consider analytics solutions to their issues and uncover new analytics needs. This consultative approach has increased awareness of the analysts’ critical role and resulted in the team being involved in a greater number of projects.

In a typical analytics project, the team’s process of collaboration includes the following activities:

- Identify possible project (initiated by either the function leader or the analytics team)
- Meet with function leader to determine the scope of the project and clarify the objective
- Brainstorm with functional leaders and subject matter experts to identify metrics for tracking and measurement
- Gather data and run analyses
- Present initial results for feedback from stakeholders
- Fine-tune the presentation of results using reports and visualizations
- Set appropriate security levels for audience
- Check in with function leaders periodically for improvements
The analytics team meets every two to three weeks to discuss current project requests from other departments. Oftentimes, through data trending and analysis, the analysts are the first to detect an issue. As part of this role, the statistics analyst may conduct analyses to identify areas in which the different HR functions might have the greatest impact; for instance, where costs could be saved or processes could be improved. Once such issues are uncovered, the team contacts the business leader to discuss whether the issue warrants a project.

When a project request comes in or is approved (depending on who initiated it), the analytics team brainstorms with key stakeholders to carefully define the desired business outcomes. Additionally, the analytics team partners with the subject matter experts in that functional area to outline operational processes and identify a list of potential metrics. By partnering closely with stakeholders while building or improving solutions, the team ensures its reports provide actionable insights. Before publishing data, the team also determines the security levels required for the users who will access the report or dashboard.

Once the team has gathered the necessary data and fine-tuned its analyses, it next automates these analyses so they are easily accessible in the future. The team then checks in with stakeholders every few months to see if changes or improvements are needed. For example, for smaller projects, infographics are sometimes more digestible by the intended audience than larger or more complex tools. This reinforces the team’s strategy of involving the intended users of the final product in the design process.

Figure 6 provides a specific example of the development of one of the analytics team’s projects. This figure shows the workflow the analytics team created for a general dashboard development project.

---

**Figure 6: Dashboard Development Workflow**

- 1. Create Aim Statement
- 2. Assess Current State and Define Future State
- 3. Brainstorm Metrics
- 4. Use Case Testing
- 5. Create a Communication Plan

The following steps take place before a dashboard is built:

1. **Creation of the aim statement.** The analytics team meets with the appropriate business leader to develop a clear “aim statement” for the dashboard project. The aim statement is written in SMART (specific, measurable, actionable, relevant, timely) format. For example, an aim statement might be something like, “Result in a 10 percent decrease in first-year turnover by December 31 next year.” The following items are determined at this point in the process:
   - Who is the specific audience for this dashboard?
   - How will leadership manage this dashboard during the goal period?
   - Who will participate on the dashboard development team?

2. **Assess current state and define future state.** The dashboard development team meets to discuss the leader’s aim statement and identify the gaps between the current state and the desired future state. No metrics are discussed at this point. Team members are assigned to research possible metrics for the next meeting.

3. **Brainstorm metrics.** The dashboard development team reconvenes to brainstorm a list of relevant metrics. The team then selects the four to six metrics that they believe will best drive change toward the aim statement.

4. **Use case testing.** Before building the actual dashboard, the analytics team builds a mock-up of the visualizations to be used and presents them to select members of the intended audience. The use cases for each metric are tested, and the results drive further enhancement in the data visualization for each metric.

5. **Create a communication plan.** While the analysts build the dashboard, the business leader and team members identify expected change-management issues and create a communication plan to address these issues with the dashboard’s audience.

**Data Challenges and Resolutions**

While having a wealth of data available for analysis is an advantage, it can also pose several data quality challenges, including inconsistent data formatting and definitions and unstructured, unclean, or missing data. Different systems sometimes format the same data in different ways. For example, person identifiers may be stored as numbers in one system and as characters in another, depending on the software requirements of various systems. The same metric can be defined differently by different departments or by external benchmarking services. In addition, gaps in data sets, or missing data, can pose a challenge.
In response to these challenges, the analytics team works closely with the systems teams to ensure clean data, create clear data definitions, and provide data stewardship. As a quality assurance measure, whenever there is a suspicion that incorrect data might be at play, the analysts review their reports with key stakeholders to ensure accuracy before delivering the information to a wider audience.

Generally, the analysts manage unclean data by tracking them to the source to correct the error. For example, in developing a recruiting dashboard, recruiters wanted to receive feedback from hiring managers regarding the quality of new hires through a 90-day posthire survey using a simple five-star rating. Upon examining the data, the team determined that few managers were completing the survey and the rating system was being interpreted differently between managers.

The analysts, systems team, and recruiters worked together to modify the posthire survey to improve rater consistency. The analysts also changed the data visualization to render the survey results in gray wherever too few managers had responded. The recruiters then used this data to conduct follow-up conversations with hiring managers to explain the importance of their feedback as part of the goal of providing excellent recruiting resources to managers.

As a result of this collaboration between analysts, systems teams, recruiters, and managers, the teams were able to gather feedback that was much more reliable and strengthen relationships between recruiters and hiring managers.

**Business Impact**

By leveraging data, partnerships with service line leaders, and collaborative teamwork, Intermountain’s analysts have brought actionable insights to stakeholders and function owners through the use of reports and dashboards. The analytics team continuously brings value to the organization as exemplified by their performance on various types of projects. To illustrate their successes, we will look at three projects that show the value of their reporting, dashboarding, and consultative capabilities.

**Project 1: Wellness Initiative**

Intermountain has carefully considered how the recent introduction of the Patient Protection and Affordable Care Act (PPACA) will affect the organization and its delivery of health and wellness benefits to both its patients and as a function of its self-funded insurance plan for employees. Aligning with the organizational goal of increasing efficiency and
implementing a shared accountability approach, Intermountain broadened its focus from healthcare delivery to also include preventive care and wellness management. A preliminary wellness goal was set to uncover the drivers of employee wellness; this information would then form the foundation for a long-term wellness strategy. As the healthcare industry shifts from fee-for-service models to population health management, Intermountain must learn how to build a culture of wellness among its own employees, and then use those leading practices to help the communities it serves.

To build this wellness program, the analytics team first met with the benefits and leadership teams to identify goals for the initiative and discuss ways to improve employee participation in the program. Next, the team met with the health insurance provider to determine what data it could access to further these goals. Because of HIPAA-compliance requirements and the confidential nature of employee health data, the team also consulted with the legal and compliance departments to ensure only the legal and ethical amount of employee data would be shared with Intermountain and its leaders, protecting employee confidentiality. The wellness program began with an employee health risk assessment (HRA) administered by a third-party vendor. Based on their assessment results, employees had the option of working with a health coach via telephone. In addition, employees were encouraged to complete quarterly online educational offerings on wellness topics such as stress reduction, healthy eating, and exercise. Drawing on lessons learned from an early regional pilot of the program in which employees participated at a rate of about 30 percent, Intermountain set an ambitious goal of achieving 60 percent participation systemwide.

After more conversations with HR leaders to explore engagement ideas, the team decided to develop an easy-to-use, interactive visual tool. The analytics team partnered with IT and data architects to create an interactive, cartoon-like dashboard on the front page of the employee web portal. The communications team then marketed this dashboard to the organization as a whole. Figure 7 below displays what an employee views after logging in to this portal. The interactive dashboard shows different cartoons depending on the employee’s personal progress in the wellness program. The colorful circles represent quarters of the year. Once an employee completes the health coaching and courses for each quarter, they received a financial reward.
Figure 7: The Intermountain Wellness Dashboard in the Employee Web Portal

To track fitness-program goals and employee progress, the analytics team developed a dashboard for HR leaders that visualizes progress at the facility level, as well as across the organization. Figure 8 shows a dashboard displaying the organization’s wellness goal targets and progress by region and facility. Limiting managers’ view to the facility level was necessary to protect employee privacy and data confidentiality. It also reinforced the strategic objective of creating a true culture of wellness.

**Figure 8: Wellness Goal Progress Dashboard for Managers**

With the aid of this wellness dashboard, Intermountain was able to achieve its annual enterprise wellness goal within the first quarter. The target was to achieve 60 percent participation by the end of the year. Surpassing that goal, by the end of the first quarter the company had already reached 60 percent participation, and had moved past that mark to 70 percent by the end of the year.

One key to the project’s success was the highly engaging employee dashboard, which made important information readily available, understandable, and actionable. Employees could simply click on the dashboard, which linked them to the next steps in the wellness program. This was the first project at Intermountain for which the analytics team used interactive data visualization to reach all employees, and it has been a very effective step toward achieving the organization’s wellness strategy.
Project 2: Standardizing the Learning Function

Like other healthcare organizations, Intermountain’s employee education component is closely tied to its clinical functions and roles. Since numerous variations exist in assignments by practice and specialty, a complex learning function is needed. To set a system standard for all of Intermountain’s facilities and regions, the organization standardizes its learning function and delivery to tie learning efforts to business outcomes.

There are about 6,000 learning modules within Intermountain’s current learning management system (LMS), which makes it a challenge for employees to find elective learning opportunities. Before transitioning to fall under HR leadership, the learning library had grown in a decentralized fashion, and no method existed to track duplication of materials, show who was using specific educational materials, or how often they were accessed. Overall, learning was managed and delivered locally at each Intermountain location. Given Intermountain’s desire to perform as a system, this issue surfaced as an actionable opportunity for Intermountain’s learning team.

The learning team approached the analytics team to discuss the challenges and their goals for advancing the learning function. Working together, the analytics and learning teams created a dashboard that tracks and identifies variations in the learning function. In the dashboard (Figure 9), the team chose four metrics to display: total cost per employee, total training hours per employee, LMS entries 30+ days after completion date, and count of active learning items. To give stakeholders a clearer idea of why these metrics are important, the driving question behind each analysis is displayed above each item.
Under the total cost per employee metric, managers can see the variance in learning investment within a job group by region. When learning managers see a large variance in spending (such as $300 per employee in one region versus $890 per employee in another region), they can investigate the cause(s) for the difference, as well as whether the training is tied to any patient outcomes.

The LMS entries metric tracks whether rosters are being submitted within 30 days after a class is held. The tracking challenge regarding this information is caused by the necessity of creating an online record of a class. Tracking the number of late entries motivated employees to record this information in a more timely manner.

The metric shown in the lower right tracks the number of active learning items, aiding educators in finding and removing duplicated or obsolete courses. The blue shaded area represents items that have been used during the last 12 months, yellow indicates items that have not been used in one to two years, and red indicates materials that have not been accessed in over two years.
After the delivery of this dashboard in March 2013, Intermountain leaders set a system-level goal to improve in these areas. The dashboard enabled learning leaders to see what areas needed change to standardize their education processes and to track progress at both regional and organizational levels throughout the year. Standardization of learning function processes and delivery enabled Intermountain leaders to implement future systemwide improvements and connect learning impact to business outcomes. The library cleanup also significantly improved the learning experience for employees. As Intermountain upgrades its learning management system, this will also result in a 33 percent reduction in the cost of migrating learning content.

Project 3: Reducing Turnover and Costs

Intermountain’s first-year turnover rate is 2 percentage points better than the national benchmark for the healthcare industry. However, Intermountain still felt that this number was too high and did not reflect its employment brand as a model healthcare employer. The analytics team studied the problem, looking for the areas of greatest variance—since in Intermountain’s experience, where there is great variance, there is often opportunity for improvement. The team found one demographic subgroup of employees whose first-year turnover rate (41 percent) was much higher than the norm. That group consisted of individuals hired as standby employees, who fill shifts as necessary. The analytics team estimated that this exceedingly high turnover would cost the organization $16 million over the next 10 years.

After identifying this variance, the analytics team selected a division in the company with a high percentage of standby employees and set a goal to reduce their first-year turnover rate by 12 percent. The project team worked closely with the division’s managers and leadership as it conducted quantitative and qualitative analyses (including data taken from focus groups, exit surveys, and interviews with managers and employees). The team worked with the organization’s recruiters, managers, the finance department, and former and current employees to uncover the drivers of the high turnover. The outcomes of the project included a full quality review of the recruiting process, infographics for managers regarding the costs of losing standby employees, and the creation of visual tools to aid in decision-making.

The analytics team discovered that the company was hiring too many standby employees because managers were creating their own contingent staffing pools to keep up with the challenges of first-year turnover. Furthermore, there were no standard hiring practices for the managers who hired these employees. And because standby employees were hired without budgeted hours, the requisitions drew less attention in the position approval process. Many managers had assumed that hiring standby employees
without budgeted hours posed no additional costs to the organization; this was not surprising, since the managers had no visual tool to track the costs associated with hiring, training, and onboarding new staff.

The analytics team developed a presentation for the finance departments involved regarding the high costs of hiring standby employees, effectively sharing the message and discussing it with relevant leadership. However, when the team shared the same 57-slide presentation with clinical managers, the graphs and numbers did not resonate with the audience. In order to better communicate how the turnover issue impacted these clinical managers’ teams and care delivery, the analysts developed a two-sided infographic to deliver the same message in a more relatable fashion (Figure 10). The team used a more colloquial analogy to communicate the costs of the turnover issue. This visual approach was much more engaging, initiated discussions, and helped the organization challenge its assumptions.

**Figure 10:** Turnover Infographic for Managers

The analytics team also provided managers with a reporting tool that shows available standby employees whose hours are not being used. This report helped the managers plan shift hours for current standby employees rather than hiring new ones. The analytics team also supported the standardization of recruiting and requisition approval processes for all regions. With access to more helpful tools to use while making hiring decisions, managers had the information they needed to better optimize their staffing and hiring activities.

As another component of this project, the team reexamined the recruiting process and its effectiveness in hiring the right candidates. According to survey feedback from former and current employees, many had joined the company with the intention of staying long-term, but eventually left when they did not get as many shift hours as they had expected. This information inspired the project team to examine the overall recruiting process, starting with how to better set expectations for job candidates considering a standby role and methods to improve the employee onboarding experience for these employees.

The analytics team had multiple conversations with the recruiting team to identify the drivers for candidate success and how to measure those metrics. In partnership with the recruiting team and hiring managers, the analytics team created flowcharts for the entire recruiting process and identified four metrics...
to track. This process involved narrowing down the list from seventy possible metrics; tracking more than six metrics at a time would prevent recruiters from focusing on the key drivers for successful hiring.

The four metrics the team decided to track were:

1. Prescreening candidate scores sent to managers for review
2. The percent of those candidates interviewed
3. The percent of hired candidates rated as five-star employees at 90 days
4. 90-day retention rates

Using these four metrics, the analytics team developed a dashboard in partnership with the recruiting team (see Figure 11). This dashboard tracked the four metrics by recruiter so that individual recruiters could compare themselves to their colleagues. It was important that recruiters not perceive the dashboard as threatening or as a scorecard, but rather as a tool to encourage collaboration and idea sharing. The analytics team piloted the dashboard with a limited audience to ensure its acceptance before releasing it to the recruiters.

**Figure 11: Recruitment Dashboard**

On this dashboard, the prescreening scores come from the initial questions that candidates answer in their job applications, which are designed to screen out unqualified candidates. The team tracked this metric to determine the effectiveness of those questions. The “percent of candidates interviewed” metric ultimately encourages more conversations between recruiters and hiring managers to clearly identify the skills, knowledge, and experience desired in candidates. Ideally, hiring managers would interview every candidate screened and forwarded on by the recruiters for review. When the graph showed that managers were only interviewing 20 percent of these candidates, it indicated that hiring managers and recruiters needed to communicate more clearly regarding the type of candidates needed. The other two metrics reflect the percentage of candidates who are rated as high performing and those who leave the organization within their first 90 days.

The work done by the analytics team to address the turnover issue had a significant impact. Coleading the initiative with recruitment, the team improved the efficiency of the recruiting process, effectively using tools to inform and engage key stakeholders and organizational leaders to work toward the common goal of reducing first-year turnover. The team’s initial goal was to reduce first-year turnover by 12 percent; however, the intervention from the analytics team combined with the expertise of recruiters and managers allowed them to improve on that goal by a significant amount. The regional departments involved in this project now successfully retain 95 percent of their new hire standby employees. As Intermountain looks to extend the leading practices identified in this pilot program, the company stands to save $1.8 million per year in hiring costs.

**Lessons Learned and Leading Practices**

Intermountain has mastered several essential lessons regarding building a successful analytics function. The following are some experienced insights and recommended practices from the professionals at Intermountain:

- **Leadership support and audience buy-in.** Support from both HR and executive leadership is absolutely critical to ensure that the organization will invest in the necessary tools to effectively perform analytics projects and deliver results. Specifically, the support of the HR vice president significantly contributes to the overall success of the analytics team at Intermountain. Part of the support from leadership comes in the form of trust—trust in both the competency of the team and the accuracy of the data provided. By taking a consultative role, the team builds strong networks and relationships throughout the organization and thus builds a reputation as a trusted source of actionable data.

- **Skills sets of analytics team members.** The analytics function at Intermountain has been able to continuously grow its analytics
Capabilities by having the right people with the right backgrounds, abilities, and skills. The number of analysts is not the most important factor in team success; what is crucial is their ability to work well together and leverage their individual expertise and the quality of their relationships with their customers. The analytics and technology director built the team around competencies in statistics, HR functional knowledge, and reporting tool skills. Team members also need interpersonal skills to work collaboratively with each other and engage with stakeholders as consultants.

- **Tools and technology.** The analytics team uses the tools and technology available to them effectively. With a data warehouse, large amounts of data can be automatically collected on a daily basis. In addition, the team leverages four classes of tools for analysis, reporting, and presentation of data: desktop analysis tools, basic reporting tools, data visualization tools, and custom web tools.

- **Actionable metrics.** Metrics are only useful and valuable if your organization takes action based on the information extracted. Data do not resonate with professionals in fast-paced, clinical settings unless they can be easily understood and acted upon.

- **Data quality.** Insights derived from data are only as good as the data itself. Numerous challenges, such as missing or duplicate data, can occur during data collection, and when they do, an analytics team will often have to go to the data source to find a resolution. This further highlights the invaluable role of relationships with other business units and technology teams.

**Next Steps**

The Intermountain analytics team has accomplished much for the organization while learning and developing many leading practices along the way. In order to strengthen its capabilities and value, the team plans on being involved in more enterprise-level projects. One such project involves improving performance feedback by assisting managers in differentiating talent and identifying employees who are key performers. The performance ratings at Intermountain do not require forced distribution and have historically been weighted higher on the bell curve, making it challenging to identify true high performers and their turnover or promotion rates. As part of the solution, the analytics team plans to identify, analyze, and track the metrics that are indicative of quality performance.

The team also plans on creating more dashboards that managers can use to track progress and areas for improvement at the regional level. With
plans to expand their reach of influence across an organization of 34,000 employees, the analytics team is studying how HR staff and leaders are using data in decision-making and developing plans to enhance the analytical tools and decision-support training available for internal clients. The team’s analysts continue to strengthen each other’s competencies, and they also plan to expand their skills to include top maturity level statistical and consulting skills.

With the explosion of new data available through ever-maturing HR software systems, the team is also evaluating business cases in which emerging Big Data technologies might be able to have an impact on problems that cannot be solved with the current generation of business intelligence tools. The team will be piloting its first Big Data technology in the coming months.

Conclusion

Facing constant shifts in the healthcare industry, Intermountain Healthcare must become more efficient while providing extraordinary care to its customers. With its growing skills sets and improved technology, Intermountain’s analytics team has proven itself to be a valuable asset to the organization, leading many projects with the ultimate goal of increasing process efficiency and providing cost savings.

The analytics team has developed its current capabilities over a long period of adjustment and growth. Over the years, Intermountain’s analytics team has developed in-house tools, implemented systems, and used advanced tools to deliver results that are engaging and actionable for their audience. The analytics function has gone through several iterations in structure and design strategy to grow as an effective analytics team. Moving forward, the team plans to expand its statistics capabilities and consultative role, deliver solutions to high-value business problems, and ultimately support Intermountain Healthcare in maintaining its status as an extraordinary healthcare organization.
The following sections will provide you with considerations for implementing the leading practices highlighted in this report.

Key Learnings

Multiple building blocks went into the success of Intermountain’s analytics team, each component complementing the others. Below is a list of key learnings from this case study:

1. **Having the right abilities is crucial.** An analytics team needs to have the right competencies and skills to execute all components of a project. The analysts must also be able to act as consultants and engage stakeholders to maximize project value.

2. **Technology and tools are essential to creating data-based solutions.** Having a data warehouse is instrumental to collecting the necessary data for analyses and to integrate those data with a company’s core business data. Analytics teams also need reporting and data visualization tools to communicate actionable results.

3. **Support from management is critical to an analytics function.** This is especially true when it comes to making essential resources available to complete a project. That support is further strengthened every time the analytics team helps the organization to achieve or surpass a goal.

Ideas for Action

Below is a list of actions to take to apply the key practices highlighted in this report. These actions enable effective implementation of an analytics strategy and function:

1. **Present leaders with a strong business case for your project.** This should include alignment to strategy, the business challenge the project will address, the budget for tools and resources, and efficiency or cost-saving benefits. Support from leadership is critical to project success.

2. **Involve key stakeholders in selecting the metrics to track and measure.** This ensures that the project will reflect their needs and maximizes their buy-in.

3. **Determine how your data are being managed and can be accessed.** The better you understand your data, the more value and insight you can draw from them.
4. **Build the right team.** Having a team of analysts with the right backgrounds and competencies who can work well together as a team is crucial.

5. **Build your skills sets.** Provide training for the analytics team to expand their analytics and consulting skills.

6. **Focus on your audience.** Think about how to tailor data insights, whether in the form of a report or a dashboard, so they can be easily understood and acted upon by a specific audience.

**Questions to Consider**

Below is a list of questions to facilitate discussion around building an analytics strategy or moving forward with your analytics function:

1. What business problems are we trying to address?

2. Do we have support from leadership?

3. Do we have the necessary tools and technology to streamline our reporting processes and move toward more in-depth analytics projects?

4. Do we have the right team in place—the right analysts with the necessary skills sets and competencies?

5. How can we access the data we have? Do we have or need to acquire or build a data warehouse?

6. How can we build relationships with our audience and stakeholders?

7. How do we present data so our audience can understand and act on our findings?

8. Are we ready to take action on data-based findings?

9. Are our current software vendors capable of delivering all of our data to us for analyses?
## Appendix II: Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 1</td>
<td>Intermountain Healthcare at a Glance</td>
<td>4</td>
</tr>
<tr>
<td>Figure 2</td>
<td>Intermountain Healthcare’s Model for Extraordinary Care</td>
<td>5</td>
</tr>
<tr>
<td>Figure 3</td>
<td>Intermountain Healthcare HR Organizational Chart</td>
<td>7</td>
</tr>
<tr>
<td>Figure 4</td>
<td>Analyst Competency Diagram</td>
<td>9</td>
</tr>
<tr>
<td>Figure 5</td>
<td>Technology Infrastructure of Intermountain’s HR Organization</td>
<td>11</td>
</tr>
<tr>
<td>Figure 6</td>
<td>Dashboard Development Workflow</td>
<td>13</td>
</tr>
<tr>
<td>Figure 7</td>
<td>The Intermountain Wellness Dashboard in the Employee Web Portal</td>
<td>17</td>
</tr>
<tr>
<td>Figure 8</td>
<td>Wellness Goal Progress Dashboard for Managers</td>
<td>18</td>
</tr>
<tr>
<td>Figure 9</td>
<td>Learning Governance Dashboard</td>
<td>20</td>
</tr>
<tr>
<td>Figure 10</td>
<td>Turnover Infographic for Managers</td>
<td>22–23</td>
</tr>
<tr>
<td>Figure 11</td>
<td>Recruitment Dashboard</td>
<td>24</td>
</tr>
</tbody>
</table>
About Us

Bersin by Deloitte delivers research-based people strategies designed to help leaders and their organizations in their efforts to deliver exceptional business performance. Our WhatWorks® membership gives FORTUNE 1000 and Global 2000 HR professionals the information and tools they need to design and implement leading practice solutions, benchmark against others, develop their staff, and select and implement systems. A piece of Bersin by Deloitte research is downloaded on average approximately every minute during the business day. More than 5,000 organizations worldwide use our research and consulting to guide their HR, talent, and learning strategies.


This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.

Copyright © 2014 Deloitte Development LLC. All rights reserved.

Member of Deloitte Touche Tohmatsu Limited.