



Customer Success Stories

How CareSource Innovators Harness VisibleThread for New Business Proposals and Implementations

Head Quarters
Ohio, United States

Size of Company
4,500+ Employees

Industry
Health Care Organization



[VisibleThread.com](https://www.VisibleThread.com)



Revolutionizing Efficiency with VisibleThread

How CareSource Innovators Harness VisibleThread for New Business Proposals and Implementations

At VisibleThread, our mission is to help your company grow, without compromise. To save your teams hours of time while bolstering their productivity. In fact, we've been helping notable companies across multiple industries revolutionize their efficiency for well over a decade. All while keeping abreast of evolving technological trends.

One such company at the forefront of its field is CareSource*. Here's how VisibleThread helped them get there.

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About CareSource

For over 30 years, CareSource has been providing "Health Care with Heart". With a mission-driven approach, the Company specializes in transformative healthcare. It puts people before profits while maintaining a steadfast "member first" commitment. Boasting a sizeable nationwide team of 4,500 employees, CareSource offers comprehensive health coverage to more than 2.3 million members. Their plans encompass Marketplace, Medicare, and Medicaid.

Fostering a culture of inclusivity, accountability, and continual improvement, CareSource continues to spearhead the care industry. Guided by core values that emphasize employee well-being and focused actions, CareSource is more than a health care provider. It's a transformative force dedicated to making a meaningful difference in its members' lives. As they succinctly put it, **"At CareSource, the difference is you."**



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Meet the Teams



Erin Hughes: Market Insights Analyst II

With over six years of dedicated service to CareSource, Erin kicked off her career as a Distribution Specialist. In her current role as a Market Insights Analyst II, she gathers competitive intelligence. This includes analyzing Request for Proposals (RFPs) opportunities to contribute to proposal strategies. Her key strength? Keeping abreast of emerging industry trends and innovations, while maintaining a comprehensive database of their cohorts' key performance metrics.

“Contracts can be up to 100 pages long. However, RFPs themselves can range anywhere from 500 pages to several thousand pages. To manually do that takes a lot of effort. So VisibleThread allows us to cut back time by shredding them quickly..”

- Erin Hughes, Market Insights Analyst II, [CareSource](#)



Lori Deaton: Manager, Market Implementations

At CareSource for 11 years, Lori is a manager on the Market Implementation Team. She uses VisibleThread to speed up the requirement identification and organization process. This enables Teams throughout the Company to quickly begin preparing to implement managed care plans in new markets.



CareSource's Market Insights Team & Market Implementation Team

The short story? These two Teams are dynamic forces dedicated to traversing the evolving healthcare landscape.

Erin works on CareSource's **Market Insights Team**, which is part of the strategy and business development function. Erin's Team researches and prepares proposals for state bids, helping to win new business proposals. They maintain a comprehensive understanding of key trends and actively engage with the proposal Team for RFPs, Request for Information (RFIs), and Request for Quote (RFQs).

In their quest for precision, the Market Insights Team collaborates extensively with various departments and relevant experts. They also carry out thorough research on industry best practices.

Lori works on the **Market Implementation Team**. The collaboration between these two Teams is vital in ensuring delivery of requirements on the launch of that new business. This Team takes the state's requirements and the proposals Erin's Team has submitted. They then work with various departments throughout the Company to develop and deliver on what is required.

Together, these Teams demonstrate a remarkable synergy. Their commitment to staying informed and capturing essential information fortifies CareSource's strategic efforts. By aligning their research and implementation strategies with the unique healthcare needs of different regions, they play a vital role in shaping the organization's adaptive and responsive approach to the industry's demands.





Overview

Given their primary customers consist of state Medicaid agencies, this requires engaging in a complex and extensive procurement process. It includes responding to lengthy RFPs that can range from 500 to a couple thousand pages. Some notable exceptions can clock in over several thousand pages with all documentation submitted

Aided by VisibleThread, the Team's expertise in navigating this intricate process streamlines the proposal response. The post-submission phase involves implementing the contract and reviewing its nuances. It also brings alignment with state requirements while being at the forefront of a fluid healthcare landscape.

The Challenges

Prior to making VisibleThread part of their process, the Team's faced substantial challenges. Namely manually reviewing extensive Request for Proposals. Let's break it down:

1. Review Fatigue and Time Consumption:

One significant challenge faced by CareSource was the inherent strain associated with manual RFP reviews. With documents often exceeding 3,000 pages, it led to fatigue and substantial time consumption. The extensive manual review process demanded meticulous attention to detail. The sheer volume presented a huge efficiency bottleneck.

2. Control+F Search Complexity:

Reliance on manual search functions, like Control+F ad nauseam added yet more complexity. The need to navigate thousands of pages brought the expected oversight risk. Rushing such searches can lead to missing critical information. This complexity in searching and extracting data made the process an arduous time vortex, rife with potential mistakes.

3. Manual Data Transfer:

Another challenge was the manual transfer of information from extensive RFPs into Excel. This laborious step added to the review time required while introducing more possible errors during data transcription. The need for diligent copy and pasting compounded the overall challenge of extracting valuable insights from these voluminous documents.



The Solution

CareSource began optimizing document analysis with VisibleThread in the following ways:

Concept Tracking: which includes precise term focus

Compliance Matrix: imperative for state requirements adherence

Responsibility Matrix: clearly identifies department-specific information needs.

Discovery Feature: for insightful document navigation

Let's break it down further:

1. Concept Tracking

With the feature's primary function focusing on specific terms, CareSource now streamlines their document review and analysis processes. Using Custom Dictionaries and groups for targeted information extraction, they leverage Concept Tracking to extract key terms. These include trademarks, copyrights, valued benefits, Code of Federal Regs (CFRs), and multicultural healthcare.

This meticulous tracking ensures adherence to state requirements, providing valuable insights into industry trends. For instance, the Team can examine competitors' strategies by pulling terms like "sickle cell". This enables them to enhance member offerings and maintain national competitiveness.

When onboarding VisibleThread, Erin collaborated with Kyle on the VT Customer Success Team. Together, they created a custom Symbols Dictionary to help prevent any potential infringements. Designed to identify symbols associated with trademarks (registered trademark symbol (®) and TM symbol) this tool enhances efficiency. It searches for unique symbols rather than relying solely on names.

By leveraging this feature, CareSource safeguards against potential confusion among consumers, while reinforcing its commitment to innovative offerings. It's an invaluable asset, providing a routine and effective means of managing trademarks. It also aligns with intellectual property protection best practices.



2. Compliance Matrix

CareSource's Market Insight's Team strategically uses VisibleThread features to optimize document analysis and cohort insights. The Compliance Matrix enhances document sharing and alignment. It focuses on primary terms, such as 'must', 'will', and 'shall', ensuring adherence to state requirements. This methodical approach prevents oversights and guarantees comprehensive coverage when responding to state requests.

The Compliance Matrix feature also tracks certain terms. These include 'requirement', 'responsibility', and 'requests', providing a detailed follow-up mechanism for checking all set measures. This orderly approach to document compliance mitigates risk, optimizing CareSource's position to secure business contracts effectively. Moreover, the combination of Compliance Matrices and Concept Tracking best positions CareSource in adapting to market trends. Collaboration between VisibleThread and CareSource creates opportunities for enhancement of its healthcare offerings.

3. Responsibility Matrix

CareSource's Market Implementation Team use the Responsibility Matrix almost exclusively. Using this feature helps them to find all the requirements in state contracts, related documents and their proposals. They can then easily identify what departments may be responsible or impacted by requirements.

This Team has developed an elaborate Dictionary that corresponds to various departments within CareSource. Using this feature allows them to identify and focus on department-specific information needs. Before VisibleThread, large groups of people were expected to find what they are responsible for in the hundreds/thousands of page contracts and proposal documents.

“Using the extensive Dictionary that we have developed and combining that with the Responsibility Matrix feature is a real time saver. It helps to sort terms by departments so that Teams can more quickly understand what is required and get started preparing for new lines of business once they are won.”

- Lori Deaton, Market Implementation Manager, [CareSource](#)



4. Discovery

Harnessing the power of the Discovery feature during its early stages of development, CareSource efficiently navigates the sizeable documents. For context, they often exceed 1000 pages. Where Discovery's capability shone most, however, was in terms of Telehealth; it went beyond the macro-level term. Showing instances that highlighted a cohort's detailed breakdown, it honed in on women's telehealth and pediatric telehealth.

This granular insight empowered CareSource to tailor its approach. It ensures the provision of telehealth services alongside the customization of offerings, thus meeting specific needs of diverse groups. Leveraging Discovery saw CareSource maximize its means to extract detailed insights. It contributes to the refinement and enhancement of healthcare benefits provided to its members.

“Discovery allows us to build on value added benefits that we give our members. So we can not only provide the telehealth, but we can also make sure that we are meeting the needs of every specific group.”

- Erin Hughes, Market Insights Analyst II, [CareSource](#)



The Impact

Post implementing VisibleThread into their proposal process, CareSource saw significant Team precision and efficiency. This increase in productivity has led to expanding VisibleThread usage in the Business Development Teams.

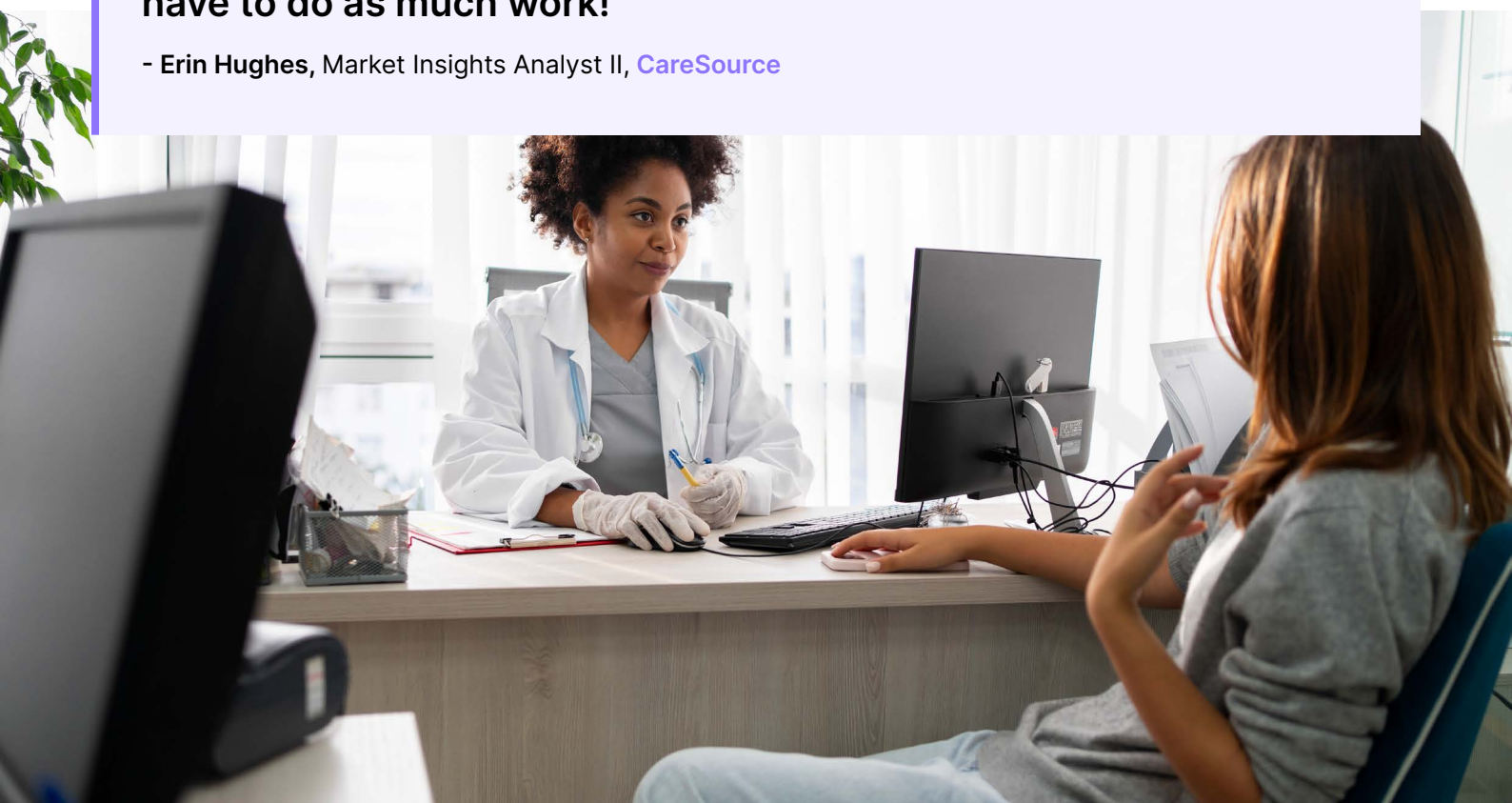
Let's delve further into the benefits!

1. Increased Efficiency & Precision

VisibleThread empowers CareSource with the means to create **Custom Dictionaries**. It allows the Team to focus on specific terms relevant to their needs. This precision in language enhances information extraction; the Team can pinpoint and retrieve the necessary data from extensive documents. Equally, the implementation of VisibleThread has significantly reduced the manual effort involved in reviewing RFPs. This automation expedites the review process while ensuring accuracy in often very large documents. Overall, it negates risk that may arise during manual handling.

“Contracts and proposals are thousands of pages. Putting it through our Dictionary helps identify and delegate what departments need to look at... Tasks that would probably take hours can now be done in less than an hour. It allows us to get more research and more work done. Using VisibleThread enables us to help others condense what they’re doing. So, whatever they’re doing on the back end of what we shredded, they don’t have to do as much work!”

- Erin Hughes, Market Insights Analyst II, [CareSource](#)





2. Advanced Contract Alignment

CareSource now possesses the agility to swiftly sift through, and extract, relevant information. Below are just three ways in which VisibleThread facilitates this process.

Streamlining:

This allows Teams to meet deadlines promptly, while ensuring accuracy.

Filtering:

Another powerful tool at CareSource's disposal is The Advanced Filtering Capabilities, which extracts specific information from documents. This functionality streamlines the review process and facilitates focused analysis. It lets the Team glean meaningful insights and trends from complex documents.

Contract Comparison:

CareSource can now track changes effectively, highlighting additions and omissions. This offers dynamic insights into evolving contract structures. By aligning these changes, the Team can discern shifts in priorities. The result? It enhances their strategic understanding of market trends and requirements.

3. Centralized Information = Enhanced Competitive Edge

VisibleThread enables CareSource to organize state-specific information adeptly. By creating dedicated state folders and filling them with relevant RFPs, the Team ensures centralized access to critical data. It does this without overwhelming SharePoint. This organized approach streamlines workflow while allowing thematic analysis.

When tracking documents by state, VisibleThread aids in identifying the various forms and requirements. How? By helping the Team focus on specific elements. The emphasis is on understanding how other entities converse with the state. In turn, this facilitates insights, which help improve strategies. It supports mechanisms to enhance the competitive edge when vying for state contracts.

“By keeping the requirements in context of the surrounding information, VisibleThread avoids missing important information.”

- Lori Deaton, Market Implementation Manager, [CareSource](#)



4. Simultaneously Manage Multiple Opportunities:

According to Market Implementation Manager, Lori Deaton, CareSource has huge plans for growth. And VisibleThread is directly helping the Company to scale. They are now able to pursue multiple opportunities simultaneously without multiplying the number of staff involved.

“Without this solution, you would need a lot more staff to do the same amount of work simultaneously. VisibleThread allows us to pursue more new business opportunities while minimizing staff increases.”

- Lori Deaton, Market Implementation Manager, [CareSource](#)

5. Ongoing Strategic Support:

The impact of VisibleThread extends beyond its technical functionalities. Regular meetings and workshops with Kyle, coupled with Team initiatives to conduct their own workshops, showcase the commitment to ongoing learning. This collective approach optimizes the use of VisibleThread and positions it as a strategic asset in CareSource's business development initiatives. It brings continued enhancement and alignment with organizational goals. Moreover, it translates to both time and dollars saved!

So far this year, CareSource has saved around

520 hours

(about 3 weeks)

\$46,000

This is expected to increase by the end of 2023.



Working with VisibleThread's Customer Success Team

CareSource's onboarding process for new Team members now involves comprehensive training of VisibleThread. As for what that might look like?

- The initial training typically includes a quick overview provided by an internal trainer advocate.
- Engaging and learned sorts, like Kyle, provide follow-up meetings to share in-depth insights.
- The new Team member is then systematically introduced to different topics related to the product. This is done via 30-minute meetings held every few weeks.
- While most quickly grasp the functions, your assigned internal trainer remains accessible for extended sessions if needs be!

Erin was a key Team member when bringing VisibleThread into the department, actively showing the benefits to coworkers. She now continues to showcase VisibleThread across the Company. She meets with colleagues and offers demos, aiming to extend awareness of the solution's advantages company wide. This inclusive strategy aligns with her goal to illustrate the widespread benefits of VisibleThread within CareSource.

“Working with Customer Success has been absolutely amazing. Any questions, I just email. They're right there to help me – so I can help my team with information!”

- Erin Hughes, Market Insights Analyst II, [CareSource](#)



Conclusion

CareSource's Market Insights Team and Market Implementation Team are fine examples of the significant benefits that come with VisibleThread. The Teams laud VisibleThread's automation in terms of how it enhances their overall workflow. It facilitates opportunity without compromising efficiency.

VisibleThread's automation, which groups and breaks down documents into sections, is seen as both a timesaving and a clarity-enhancing feature. This streamlined approach boosts productivity while fostering a more focused and informed decision-making process.

“VisibleThread keeps growing in CareSource. Everyone who sees it is in love with it and sees its potential.”

- Lori Deaton, Market Implementation Manager, [CareSource](#)

Overall, CareSource's use of VisibleThread revolutionized its competitive insights process. It mitigates manual review challenges, enhances precision, and optimizes efficiency. The impact spans:

- **The streamlining of document analysis**
- **Strategic decision-making**
- **Facilitates effective collaboration.**
- **Saves a huge amount of time when compared to the manual option.**

This showcases VisibleThread's integral role in navigating the dynamic healthcare landscape. Ultimately, this contributes to CareSource's commitment to member-first healthcare solutions.

“From a competitive standpoint, VisibleThread helps us by being able to review competitor RFPs. We can zone in on things that they're doing and pull the information quickly. Through analysis of documents shredded through VisibleThread, it allows us to see the next steps we can take as we work towards providing the best services to our members.”

- Erin Hughes, Market Insights Analyst II, [CareSource](#)

Are you interested in learning more about VT Docs?

Register for our no-obligation
live demonstration.

Live demo

**Need help or
have a question?**



Talk to us by mailing
info@VisibleThread.com to find out
how you can avoid these mistakes.