

Ochsner Health System

For Ochsner Health System, Maestro Returns MDM to the Picture of Health

Managing their ever-changing
and deployment-critical
employee information

Ochsner Health System is southeast Louisiana's largest non-profit, academic, multi-specialty, healthcare delivery system, with nine hospitals and more than 40 health centers in Louisiana, conducting over 300 clinical research trials annually. With more than 14,000 employees, and over 900 physicians in over 90 medical specialties and subspecialties, master data management (MDM) is key to keeping Ochsner Health System at the forefront of the highly regulated and data-intensive healthcare industry.

Business Challenge

Managing employee data across an organization as geographically and functionally diverse as Ochsner would be a challenge in any industry. It is especially so in the healthcare industry, where accurate, up-to-date information on the certifications, specialties and availability of employees is key to rapid mobilization of personnel in cases of large-scale health emergencies, such as occurred with Hurricane Katrina in 2005.

Ochsner has more than 14,000 active employees, not including contractors. When they factor in a year's worth of historical data, including terminated employees, and account for duplicate employee records incorporated from multiple source systems, they are dealing with an employee database of some 150,000 records. For Ochsner, it is mission critical to be able to identify the master record for a given employee, and ensure that the employee data is accurate. They need to be sure that incorrect or duplicate employee information coming in to their data warehouse from various source systems can be easily detected



MDM Domain
Employee

Industry
Healthcare

and managed, and that employee information being accessed by various operational systems is reliable and correct. To accomplish this, Ochsner recognized that they needed a master data management solution for their employee data.

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According to Ochsner’s data warehouse architect, Thom Mathes, “The goal was to master the employee information from our Human Resources system, Lawson; the login and security information associated with those employees from our Active Directory application; contact data from our phonebook system; and data that originates in our service management application for things like trouble tickets and service requests. All of that information needed to be merged.”

Ochsner selected an MDM software product, and began building their initial model. It took eight months to build the model and put it into production. “We hit endless roadblocks, but we did make it all the way through to production use, at least with the service management application, and, in a limited capacity, with the phonebook. But for the most part, that was it. It wasn’t fully utilized,” Mathes admits.

Ochsner’s MDM team continued to work with the initial implementation for the next 10 months, operating at minimal functionality. They were not extending their data sources, and the company’s data stewards, those responsible for ensuring accurate, real-time information, had not been using the tool since early in the implementation.

“The data stewards had been trained on the stewardship tool,” Mathes says, “but the tool began to

develop technical issues, and eventually, it was no longer usable. As a result, for several months, there had been no stewardship input into the MDM process.”

Even with the implementation at a minimum level of functionality, Ochsner’s MDM team knew that they needed to expand their impact to other domains, such as provider and patient data. So they went back to their initial vendor to see what it would take to address their planned expansion.

“Unfortunately, when we approached them to expand our MDM implementation, the pricing they came back with wasn’t realistic. They were going to charge us per domain, and by number of consolidated records,” says MDM program director Steve LaBorde. “They didn’t understand that, for our MDM needs, their pricing model couldn’t work in a health system of our size.”

Prescription for Growing Pains: Master Data Maestro

Faced with an MDM tool that had fallen short of their original goals, and a vendor pricing model that prohibited the required growth of their MDM implementation, the team decided to investigate an option from their original MDM product search—Profisee’s Master Data Maestro. Profisee provided them with easy integration with their existing ETL solution, as well as an optimal growth model and an accelerated implementation service offering. All of these were key to replacing the existing MDM model without losing ground.

LaBorde explains, “The challenge was to recreate the capabilities we had spent 18 months developing with the previous tool, train our people on the new Maestro solution, and get into production as quickly as possible. I worked closely with our CIO to make sure he understood where we wanted to go and why we wanted to make the switch. He agreed, and agreed that we needed to move quickly. We did some additional investigation and due diligence, and felt that Profisee was still the best way to go.”

It proved to be a good decision for Ochsner. “Once we decided to make the change, and got into the Maestro

implementation, we realized that we got a much better solution that would more effectively suit our needs,” LaBorde confirms.

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Maestro Solution

In their initial MDM product evaluation, Ochsner had identified Master Data Maestro as a leading contender. Now, with the decision to replace their original MDM tool, they hoped to take advantage of Maestro’s best-in-class user interface to reengage their data stewards in the MDM process; to leverage Maestro’s large-volume match-merge capabilities to finally master an employee Golden Record; and to establish with Maestro a foundation that would allow them to effectively and affordably expand their MDM solution across multiple domains.

“We had very ambitious objectives for the Maestro implementation,” LaBorde says. “We wanted separate environments for development and testing activities, so that these activities could take place concurrently. We wanted to be able to practice deployments, integrate the MDM solution, and create a ‘production-ready’ employee model that would replicate the scope of the existing MDM solution very quickly.”

To this end, Ochsner engaged a Profisee Master Data Accelerator services offering. The Accelerator engagement rapidly delivers the fundamentals of an MDM implementation, while simultaneously ensuring clients procure the skills and training necessary to manage and maintain their own MDM initiatives. The primary goal of the Accelerator is to empower client

self-sufficiency within four to six weeks—enabling clients to minimize the cost and maximize the efficiency of their MDM implementations.

Accelerating Success

The standard objectives of the Accelerator engagement are to help the client learn the user interfaces and best practices of model building in the MDS/Maestro environment, and to mentor the team in evaluating design choices, solving problems and measuring and improving their data quality. To these objectives, Ochsner added their specific objectives of creating a production-ready employee model that would replicate and be able to replace the existing MDM solution by the end of the six week Accelerator engagement. This might have seemed an unlikely outcome, given Ochsner’s experience prior to Maestro, but it turned out to be completely achievable.

“The really nice part about the Accelerator,” comments LaBorde, “is that it’s very structured. They don’t just show you what to do; they’re showing you why and how, so that’s extremely powerful.”

For the first four weeks of the Accelerator engagement, Profisee consultant Lee Gregory worked closely with Ochsner Master Data Administrators Emil Chavez and Veera Chavvakula.

According to Chavvakula, “The Accelerator experience was pretty nice, actually. We started with developing an employee model that fits our environment, and Lee was guiding us, but we were the main people driving the process.”

“The very first thing we did was some training, which Lee provided and did a wonderful job of, and then, as Veera said, they worked on the model,” Mathes confirms. “The Profisee folks provided help and guidance, but ultimately the implementation was up to Veera and Emil, which was a huge benefit, because it means that we really learned Maestro. It wasn’t handed to us, we had to do it. I think we definitely got a leg up from the Accelerator. I think that having Profisee here at the beginning was a big help, we probably wouldn’t have moved as fast as we did, otherwise, but in six

weeks we got to the point where we actually have the employee model in Maestro, in production and in use, and that's unheard of compared to how long it took us to get the previous model up and running— eight months, compared to a month and a half to get Maestro up and running. That's a remarkable gain on our part."

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One team member even commented during the Accelerator wrap-up meeting, "We are further in six weeks than we were in eighteen months with the initial model."

Asked whether their rapid success could be attributed in some measure to the experience gained through the original MDM implementation, LaBorde replies, "We did go in to the Maestro implementation with some general understanding of MDM concepts, and we got the right people involved from the beginning, so that helped. But Maestro is a very different product. There was not a lot of transferrable learning. The difference was the Accelerator, and the usability of Maestro. We never completed a Golden Record before; with Maestro, we have that and much more. We have functionality today, including hierarchies, which we would never have had with our initial implementation."

Results

By the end of the Accelerator engagement, Ochsner's development team had an employee model that sourced data from their HR system, service management system, Active Directory, the in-house phonebook app, and the original MDM implementation. They also had a derived hierarchy from the HR system's manager relationship data, which

was extended to present a cleaner and more manageable data set. Business rules were in place to enforce data quality and provide additional information, and seven matching strategies had been created. Systems can read conformed master data from the Golden Record subscription views, ensuring that all Ochsner systems are seeing and using the same employee master data.

LaBorde expresses the MDM team's satisfaction. "We wanted to do what we're doing today, and we wanted to have it production-ready by the end of the Accelerator timeframe. We met those two goals. In fact, we exceeded those two goals, in that we have a better product that's doing more now than what we were doing before."

"In fact, as we began to work with Maestro, we discovered that there were issues in the MDM data that no one had detected before. So, although the previous implementation was in production, there's some question as to whether it was really 'production-ready,'" Mathes contends.

LaBorde explains, "While the initial MDM solution was still in production in parallel with Maestro, we found problems on several occasions where records were wrong, and when we checked the same records in Maestro, we found that Maestro had handled the problem correctly, whereas the prior implementation did not."

The data issues were surfaced by Maestro's matching capability, and included employees with circular management relationships, inconsistent employee or employment status codes, codes that were not in the master record showing up on the employee status, and employees missing job codes. The matching function in the initial MDM tool was so complicated that the data administrators didn't understand it, so these errors had remained undetected in the data.

Another area of improvement was with their internal phonebook application, which allows them to search their 14,000 active employees and 20,000 phone listings by name or department, to get direct dial phone numbers.

“As it was implemented with the initial MDM tool, the phonebook took data in, but didn’t return updates,” Mathes comments. “In the Maestro implementation, it is ‘round-tripping’.”

Chavez adds, “Because of the situation with hurricanes down here, we have an essential employees list, where, for each of the employees in the list, we need to know certain information about additional contact numbers, where the employee may be located – all kinds of different information is needed. We break people down into groups: A Group, B Group and C Group. During hurricane emergencies, Group A people check themselves in, and they’re there for the duration of the storm. Group B people are set to relieve Group A, so they have to be within 24 hours of the location. So there is an application built around that, and I know that they want Maestro to start consuming some of it in SharePoint.”

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“We’re a big SharePoint site,” LaBorde confirms. “So the User Experience developers were very excited about using the Maestro SDK, because it gives them out-of-the-box Web Parts to create a Web service for SharePoint. That’s something that we did not have with the other tool. The developers are already seeing possibilities of how they’re going to incorporate that data, and be able to use the product and the Web Parts in many of the things that they’re doing.”

“The administrator on the service management side is receiving benefit from the Maestro SDK, as well, because the service management system is consuming this data, and the administrator is already sending us requests for changes and things that she wants to add,” LaBorde adds.

In fact, in the first week of SDK training, one such change request came in on the service management system, and the developers were able to update it in the MDM hub immediately.

LaBorde concludes, “Ultimately, the end result of the switch to Maestro is that we have more inputs, more sources now than we did before; we have more outputs, more consumers, and we have a better way to integrate our data through Web services and the SDK. Overall, we think that we just have a better product, and a package that will allow us to model and turn out new domains faster. So right now, we think we’re in pretty good shape. We’re very happy where we are.”

Looking Forward

With a more accurate, agile and usable MDM solution in place, and freed from a growth-prohibitive vendor pricing model, the future looks bright for Ochsner’s MDM team.

“We have plans for future domains that will impact considerably wider areas of the organization,” says Mathes. “The employee domain may have more limited applications, but when we start getting into provider and patient, that’s going to have a huge impact on business intelligence and the warehouse, and it’s going to simplify reporting issues. So eventually the whole organization is going to benefit.”

Asked about what domain they will tackle next, LaBorde replies, “It really hasn’t been determined officially, but we are looking at two things related to the provider master. The first one is what we’re calling our EDW provider master, and that is simply using the five different sources that we currently have in our enterprise data warehouse – so we could have five different rows in a table that really are for the same physician. The first phase of implementing the provider domain would be to consolidate all those with a master record for our data warehouse. The second phase would be to bring in other external sources, other people and data stores that need to use this data. We’ll bring them in to the mastering process and extend the value of the provide master. Then, we believe the next domain would be the patient master. We’re hoping to consolidate that with Maestro by next year.”

Lessons Learned

When asked what advice they have for organizations that are facing similar MDM challenges, LaBorde recommended starting with a clear understanding of what you want to accomplish.

“I think it’s hard to get your head around master data management, in the sense that there are a lot of parts to it. It’s a philosophy, and hopefully the tool won’t get in the way of what you’re trying to do – of what you really need to do – with your data. You really need to understand what you’re trying to accomplish; that’s key, because you can do a lot of things, and a tool is just that. You can use a hammer for a lot of the wrong reasons, so make sure you don’t let it get too big, don’t try to do too many things at once.”

Mathes points out the value of education around what MDM is, and why you need it.

“I think giving a concrete example of the type of data that needs mastering is a really good idea. We had people here who didn’t understand why we needed a master data system at all. Even today, there are people in this organization who will say, ‘Oh, we already have an employee master; that’s Lawson. We already have a provider master; that’s such-and-such.’ They don’t realize how many disparate versions of the same information related to the same entity exist in those systems. Give them a concrete example, for instance, saying to those people who say Lawson is the master, ‘Well, but Lawson doesn’t control how you log in, so is Lawson really the master?’ Otherwise, you can get resistance to even the concept.”

LaBorde comments, “On the flip side of it, our CIO likes to say that the organization as a whole doesn’t understand it at all. They just assume that you’re already doing it. They don’t understand that there are five to seven different sources of data for a single position. So they don’t really have an appetite for it, they don’t really want to understand it, and they think that we’re doing it already. It’s a tough one to describe to people, so that’s our job, to go out there and make sure they understand it.”

LaBorde concludes, “We’re not saying that we’re not going to struggle even further with that, but it’s not different than a lot of other disciplines that are hard to describe, like business intelligence, or even data warehousing. You know, once you start getting a few wins and people start seeing it, then, the grassroots movement will kick in and those people will start to spread the word. It’ll be the same thing here. We don’t have that many users on the employee side of it, but when we get into physician, and we start getting into patient, they’ll come flying.”

And with Maestro in place, Ochsner’s MDM team will be ready for them.

Profisee — A Trusted Advisor

Profisee is a master data management software company focused on delivering enterprise-grade MDM capabilities through its Master Data Maestro software suite. As a Microsoft Gold Application Development Partner, Profisee has a worldwide reputation for Master Data Management expertise and competence with Microsoft Master Data Services.

website :: www.profisee.com

Americas :: +1 678 202 8990 | info@profisee.com • Asia & Oceania :: +61 (0)2 9931 7874 | aus-info@profisee.com
UK :: +44 (0) 2084 336572 | uk-info@profisee.com • EMEA :: +44 (0) 2084 336572 | emea-info@profisee.com