



**I need some Account Managers
How many do you have in stock?**

(A model for staffing Service Account Managers)

**Jesus Blasquez
Director Client Services
Soft Computer**

About Soft Computer

- Privately held
- 1979 Introduced 1st LIS system
- R&D - Growth Driven Company
- FDA regulated class 1 and 2 medical devices for clinical laboratories
- All clients purchase maintenance and support

Our Customers

- Wide variation in size and complexity
- Hospital IT support 100's of applications
- LIS – Managed by Medical Personnel
- Highly Regulated
 - City, State, Provenance
 - AABB, CLIA, JCOHA, CAP
- Changing requirements- LOINC, ICD-10, HIPAA, EMR, Meaningful Use, Reporting to State and CDC, Sentinel Events, Hedis

Client Services

- Technical Support provided by Medical Professionals and assigned by product and client
- Assigned Account Executive
- Software Upgrades included in maintenance
- Charges for professional services



"Someone calling themselves a customer says they want something called service."

Account Executives Roles

- Customer Relationship Management
 - Key Contacts
 - Help LIS Admin define and managing organizational expectations
 - Coordinate resolution for escalated issue
- Project Management
 - Foreign System Interfaces
 - Manage SW Patches and Hot Fixes
 - Manage SCR
- Financial
 - Process project billables
 - Review and process quotes



**HOW ACCOUNT EXECUTIVES WERE
STAFFED**

**SIT ACROSS FROM THE OWNER AND
ARGUE**

AE Legacy Staffing System

Charles Daysh			
BRKVL	L.R.	Brooksville	FL
BILOX	L.R.	Biloxi	MS
CARLI	L.R.	Carlisle	PA
CAROL	L.R.	Hartsville	SC
CHARL	L.R.	Punta Gorda	FL
CMMC	L.R.	Jackson	MS
CRAW	L.R.	Van Buren	AR
DAVIS	L.R.	Statesville	NC
EASTP	L.R.	Lehigh Acres	FL
EGRMC	L.R.	Statesboro	GA
FENTAS	Impl		
FISHE	L.R.	Marathon	FL
FRANK	L.R.	Louisburg	NC
HEART	L.R.	Davenport	FL
HISEB	L.R.	Sebring	FL
LAKEN	L.R.	Mooreville	NC
LEE	L.R.	Pennington Gap	VA
LOWER	L.R.	Key West	FL
LRMC	L.R.	Lancaster	PA
MESQU	Impl	Mesquite	TX
MHLAN	L.R.	Lancaster	PA
MIDWE	L.R.	Midwest City	OK
NWMIS	L.R.	Clarksdale	MS
OKLAH	L.R.	Durant	OK
PASCO	L.R.	Dade City	FL
PAULB	L.R.	Paintsville	KY
RILEY	L.R.	Meridian	MS
RV	L.R.	Gadsden	AL
RIVOA	L.R.	Jackson	MS
SAND	L.R.	Hamlet	NC
SEBAS	L.R.	Sebastian	FL
SROSA	Impl	Milton	FL
STRNG	L.R.	Anniston	AL
SWEST	L.R.	Little Rock	AR
UCMC	L.R.	Gaffney	SC
WILL	L.R.	Williamson	WV
SASKA	C.D.	Saskatoon	SK
DUNN	C.D.	Bedford	IN

Michael Uqarte				
STMVV	M.U.	Huntington	WV	2
CABEL	M.U.	Huntington	WV	3
CAMC	M.U.	Charleston	WV	2
GERAL	M.U.	Alamogordo	NM	2
AHM****	C.D.	Rockville	MD	0
BEND	J.M.	Bend	OR	3
BMH	C.D.	S Lake Tahoe	CA	1
CARSO	C.D.	Carson City	NV	2
GRANA	A.P.	Granada Hills	CA	2
KINO	M.U.	Tucson	AZ	2
METHODIST			CA	2
VERDE	H.J.	Cottonwood	AZ	4
SOCAL	L.F.	Pasadena	CA	4

Key Components of New Staffing Model

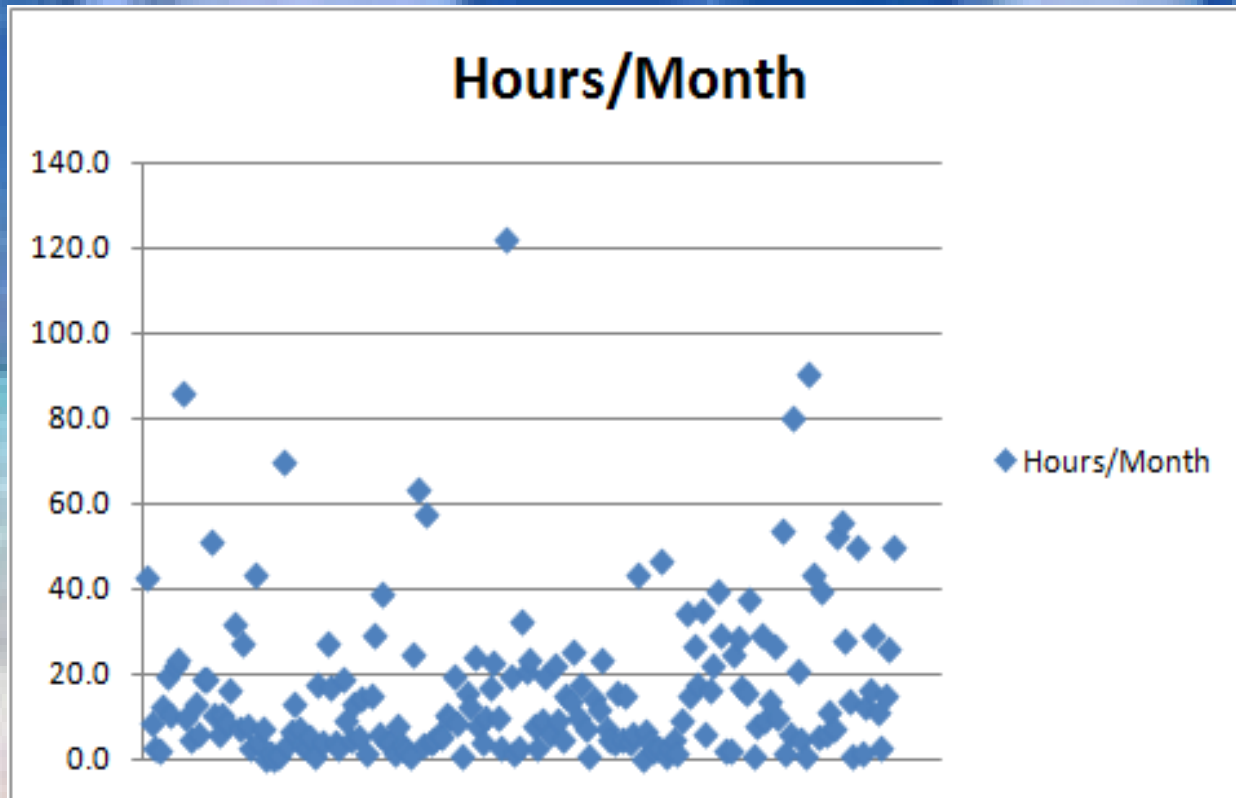
- Logical way to classify clients
- Quantitative weighting system
- Correlate service needs to classification
- Apply classification to predict staff needed to support client transitioning from Implementation
- Make travel Reasonable and cost effective

Client Classification

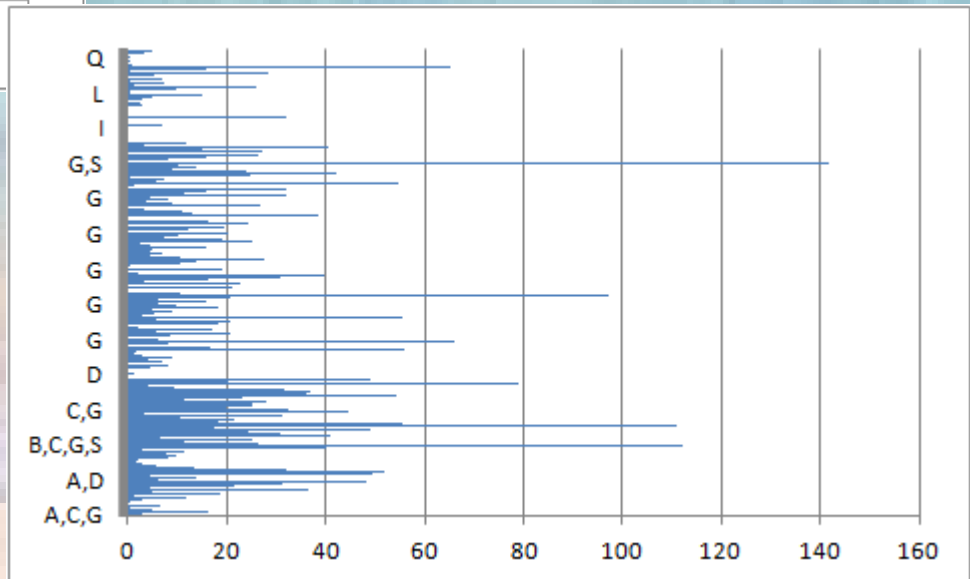
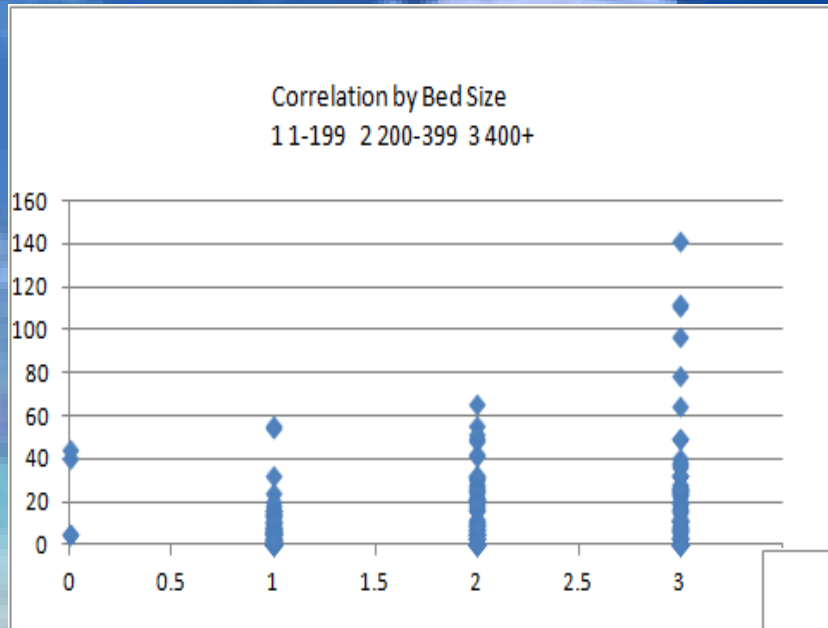
- No implied importance if revealed to client
- Easily understood internally
- Not subjective
 - could be correlated with other corporate decisions – sales or beta
 - Satisfaction / client loyalty
 - Correlated with client life cycle – new or query

A	At Risk of Leaving
B	Beta Client
C	Corporate Client
D	Dissatisfied Client
G	Generally Satisfied Client
L	Leaving
N	New Client
P	Software Problems
Q	Query Database
S	Sales reference Client
R	Reference Client

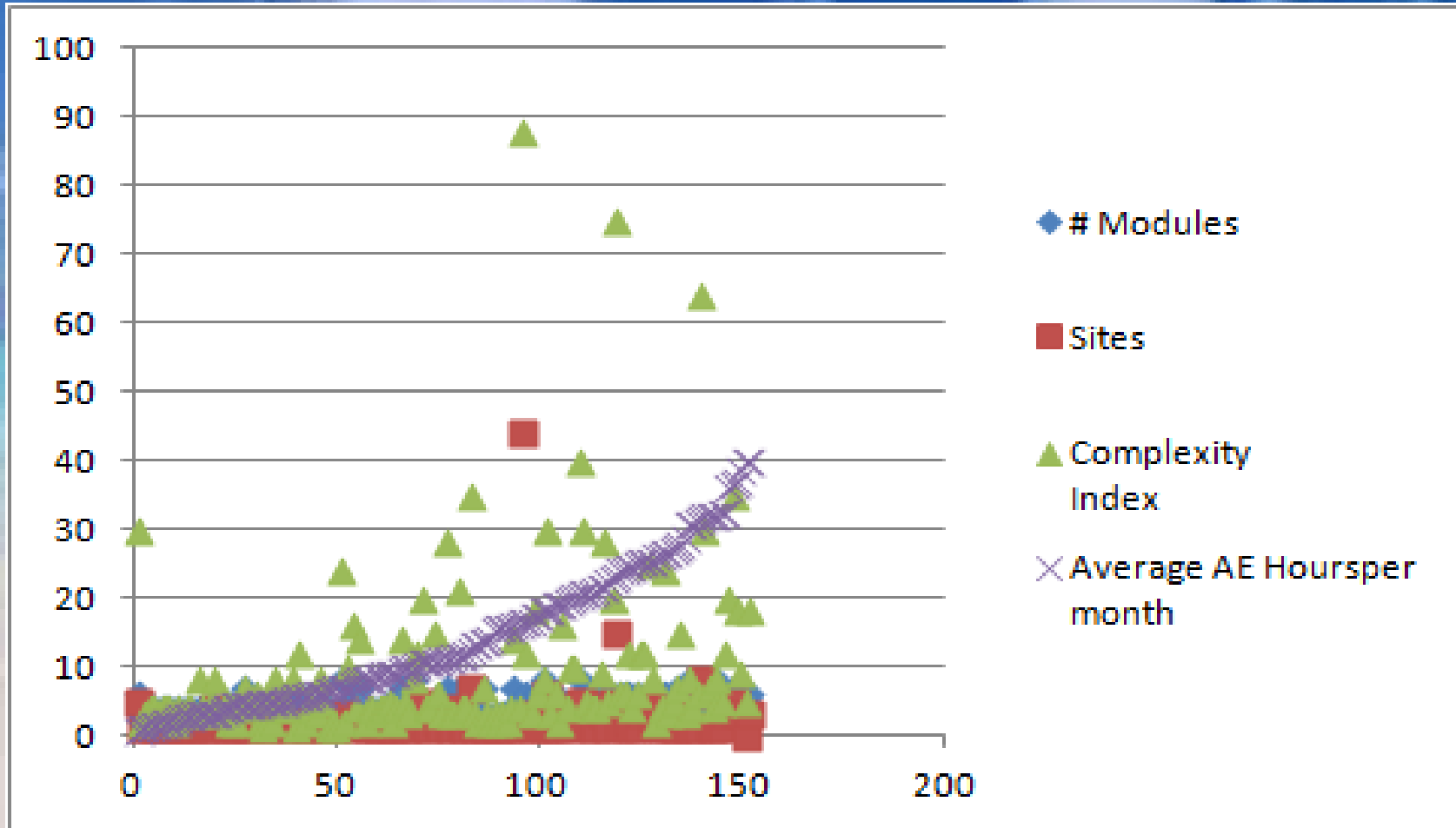
Calculate Total Hours per client



Client Correlation



Client Correlation



Establish Minimum Service Level

- Moderate a monthly conference with Key Decision Makers - 4 hours
 - Gather agenda items and brief the staff
 - Moderate the conference call
 - Follow up on action items

Analyze the Outliers

- P =clients with “problems” needed much more attention – added 12 hours (weekly conference calls)
- N=new client – added 4 hours
- R=reference – added 4 hours

Applying the Rules to set the budget

# Modules	Sites	Complexity Index	Budget Hours (Monthly/Quarterly)									
			Budget Hours based on Complexity	A-At Risk-4	U-Upgrade Prep-4	N-New Client-4	S-Sales Reference-4	P-Software Problems-16	Total Complexity Budgeted Hours	AE Recommended Quarterly Hours	Approved Quarterly Budgeted Hours	
4	1	4	4							4	66	30
4	1	4	4							4	10	12
4	4	16	7				4			11	180	60
6	1	6	5							5	75	42
1	1	1	4			4	4			12	2	12
5	1	5	5							5	5	15
7	1	7	5				4			9	225	100
6	1	6	5				4			9	90	50
1	2	2	4			4				4	12	12
4	1	4	4	4						8	15	6

Quarterly Variance Analysis

Budget Hours (Monthly/Quarterly)								1st QTr 2012			2nd Qtr 2012			3rd Qtr 2011			4th Qtr 2011			YTD Variance	
Budget Hours based on Complexity	A-At Risk-4	U-Upgrade Prep-4	N-New Client-4	S-Sales Reference-4	P-Software Problems-16	Total Complexity Budgeted Hours	AE Recommended Quarterly Hours	Approved Quarterly Budgeted Hours	AE Adm/ Backup	AE Act Hours	Variance	AE Adm/ Backup	AE Act Hours	Variance	AE Adm/ Backup	AE Act Hours	Variance	AE Adm/ Backup	AE Act Hours		Variance
4						4	66	30	2.4	9.2	-20.9	0.5	9.9	-20.2	5.3	17.3	-12.7	3.1	22.3	-7.7	-61.4
4						4	10	12		0.3	-11.7	0.5	2.9	-9.1	0.3	5.8	-6.2		0.9	-11.1	-38.1
7				4		11	180	60	2.4	52.8	-7.2	0.5	48.1	-11.9	6.8	87.3	27.3	5.7	59.4	-0.6	7.6
5						5	75	42	3.1	27.4	-14.6	3.3	43.8	1.8		11.8	-30.2		22.0	-20.0	-63.1
4			4	4		12	2	12			-12.0		2.8	-9.2	0.8	0.4	-11.6			-12.0	-44.8
5						5	5	15	1.2	39.4	24.4		45.1	30.1	0.2	25.4	10.4		32.5	17.5	82.4
5				4		9	225	100	5.8	77.4	-22.7	3.3	101.6	1.6	2.1	64.6	-35.4	11.0	100.2	0.2	-56.2
5				4		9	90	50	0.3	42.2	-7.8	0.5	68.1	18.1	1.1	49.3	-0.7	11.0	103.4	53.4	63.0
4			4			4	12	12	1.3	4.9	-7.2		1.8	-10.2	0.6	28.2	16.2	1.2	6.5	-5.5	-6.6
4	4					8	15	6	0.5	8.2	2.2	1.8	13.5	7.5		3.1	-2.9		0.3	-5.7	1.1
									1.5	15.8	15.8	4.6	18.7			49.5	49.5		37.0	37.0	102.3

Current Process

- Apply complexity rules to implementation clients
 - 9 to 12 months lead time
- Add hours for Problem, New ,Reference ...
- Set the travel “hub”
- Analyze AE’s ability to absorb the new client
- Use Common sense – it’s just a tool
- Make assignment and monitor quarterly
- Adjust and rebalance – as seldom as possible



What should do?

My recommendations

- Analyze non-transaction areas of your business
- Identify the drivers for client satisfaction
- Build a quantitative model
- Apply the model and measure the outcome

Questions?

