

## *Enabling Performance through Web-Based Training, Online Help, and Performance Support Systems* Capital One Healthcare Finance

Background: Capital One Healthcare Finance is a wholly-owned subsidiary of Capital One Financial Corporation. For over a decade, the company has become the leader in patient financing by focusing on low rates to patients and best-in-class customer service to patients and practices.



Capital One®

Capital One Healthcare Finance (COHF) offers flexible patient financing programs for a variety of healthcare industries:

- Dental
- Cosmetic
- Vision
- Orthodontic
- Fertility

Healthcare providers offer financing to their patients to increase customer service and to grow business. Because providers determine which financial company and plan to offer, catering to the needs of providers is key to COHF's success.

In 2006, COHF created Online Services, a web-based application that allowed providers to create and submit loans while the patient was in the office, and helped providers monitor and manage their loan pipeline. For COHF, this project represented "the biggest development project in the history of the growing business."

Challenge: COHF knew that they needed to help providers – and internal COHF staff – learn about and use Online Services. However, since the tool was new, many work processes and procedures were undefined and others required modification.

It was determined early on (with Entelechy's help) that Web-Based Training (WBT) and online user help would be the primary training and support methods for providers. Unfortunately COHF did not have experience in creating customer-facing training and online support tools. COHF knew that Online Services would be only as effective as the providers using the tool; and that enormous risk – and reward – lie in effective support mechanisms.

Solution: Steve Pratt, Training Manager at COHF called on Entelechy for broad support that included:

- Training Consulting
- WBT Design and Project Management
- User Help/FAQ Documentation
- Desk/Job Aid Creation
- Sales Training
- Operations Training

Entelechy determined a strategy whereby we would help articulate the new workflow processes and procedures and create a “User Guide” repository from which we could create WBT, online user help, desk aids, sales training, and operations training.

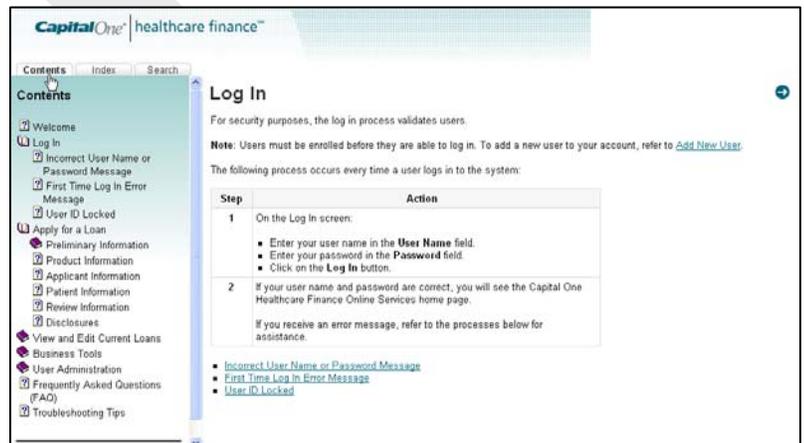
### Web-Based Training

Entelechy worked with Capital One University’s E-Learning team to select and manage a WBT vendor from design, through development and internal review, to deployment. According to the COHF’s project manager, Christina Colabella, we created “excellent web-based training (professional, sleek, and EASY to use!).” The WBT can be viewed on Entelechy’s website at [www.unlockit.com/OS/index.htm](http://www.unlockit.com/OS/index.htm)



### Online User Help

Entelechy created the Online User Help that was married with the Online Services application to provide a seamless, real-time access to detailed help. The Online User Help was created by Entelechy using Easy Help™ (and modified by Entelechy’s webmaster) and can be viewed at [www.unlockit.com/PPHelp061214/index.html](http://www.unlockit.com/PPHelp061214/index.html).



### Quick Reference Guide Desk Aid

Entelechy worked with the COHF marketing team to create a desk aid that would serve as a quick reference for providers. The tool was designed to complement – not duplicate – the WBT. As such, the desk aid included a system requirements section, a “getting started” section, a trouble shooting section, and sections for important but complex tasks.

### Sales and Operations Training

Entelechy created and helped facilitate COHF internal training to sales staff, help desk staff, and operations staff to ensure that everyone knew how to position and/or support the new tool with providers. The training was targeted for each audience and included significant hands-on use of the Online Services application.

Results: Entelechy was able to provide expertise to all facets of the project. Our approach to gathering/creating work procedures for this new application not only provided content for training and support tools, it enabled us to identify software problems and potential issues early in the process, allowing time for the software development team to address the problems and make improvements.

Additionally, our expertise ensured that the training and support was geared at the appropriate level for each audience. For example, knowing that the audience for the WBT would be providers, we recommended a balance between marketing and training – there would be **no** tests in this WBT and interaction would be kept to a minimum allowing learners to complete the training rapidly and relatively unfettered.

According to Tim Belmonte, COHF VP, “An amazing amount of time and energy has been spent developing a top notch product - one that we can all be proud of! The portal will greatly enhance our ‘ease of use’ proposition helping to ensure we continue our amazing growth trajectory.”

With Entelechy’s help, COHF is on target to leverage Online Services to account for almost \$100,000,000 in annual funded volume with a net present value of \$6,000,000. Staff and user proficiency play key roles in the success of Online Services, and Entelechy was integral to ensuring that proficiency.

