

Case study



Precision at peak: How HealthPlanOne built a data-driven workforce around Medicare's most demanding season



The new system has transformed the way we use data, giving us insights through data that are both accessible and actionable.

Matt Brewer

Director of Workforce Management, HealthPlanOne

+10 pts

adherence improvement
first AEP on IEX vs.
prior year



#1

smoothest AEP on record
per major insurance
carrier partner



Peak season

headcount managed
to budget through
full AEP season



2

major insurance partners
consolidated into one
IEX environment



4,000

peak agents managed
through AEP with
real-time visibility



Customer profile

Industry

Healthcare

Website

hpone.com

Location

Americas

Size

Enterprise

Products

- NiCE CXone platform
- Workforce Management (IEX)
- Employee Engagement Management

Goals

- Establish real-time workforce visibility across a peak-season Medicare BPO
- Improve agent adherence and staffing precision during AEP
- Enable WFM and Operations to make faster, data-driven decisions together

Features

- IEX WFM scheduling, forecasting, and intraday management
- Real-Time Adherence and Intraday screens
- First-of-its-kind multi-IEX live data integration with a major Medicare insurance carrier





01 Before

A business that lives by the calendar, and the data to run it

HealthPlanOne (HPOne) is a healthcare BPO built around one of the most time-compressed, high-stakes moments in consumer health: Annual Enrollment Period. Every fall, Medicare-eligible Americans have a narrow window to choose their coverage for the coming year. HPOne's contact center operation scales to 4,000 agents to support this critical period, connecting consumers with guidance and enrollment support that must be right, on time, and at volume.

The workforce management platform supporting HPOne's operation was no longer providing the visibility, coordination, and operational agility required to support a rapidly scaling contact center environment.

As the organization grew, limitations within the existing system became increasingly difficult to work around. Supervisors lacked real-time visibility into agent activity, adherence tracking was limited, and Workforce Management and Operations often relied on disconnected views of performance during the compressed and business-critical Annual Enrollment Period (AEP). Leadership also faced challenges accessing live operational insights. Simple but essential metrics – such as current active agent counts or real-time staffing visibility – were difficult to obtain quickly, limiting the organization's ability to respond proactively during peak periods.

While data existed within the platform, it was not easily actionable. Many operational decisions that should have been driven by real-time insight instead relied heavily on manual interpretation and experience. For an organization operating within a narrow and high-stakes enrollment window, greater visibility, alignment, and responsiveness became essential to scaling effectively.

02 Desire to change

Returning to a platform built for this work

The need for greater operational visibility and alignment ultimately led HPOne's Workforce Management and Operations leadership teams to pursue a new approach. The priority was clear: a platform that could surface real-time data, enable

genuine collaboration between workforce planning and the floor, and give HPOne confidence in its staffing decisions throughout AEP. Achieving that level of real-time insight and coordination required a more modern approach.

HPOne turned to NiCE IEX Workforce Management, a platform the organization had used previously, specifically because of IEX's depth of features and the quality of data insight it provides. Matt Brewer, Director of Workforce Management, joined the organization in part to lead this transition. The decision was further supported by Employee Engagement Manager, which offered automated scheduling flexibility that would give agents meaningful control over their own schedules without sacrificing staffing precision.

HPOne went live on NiCE Workforce Engagement Management in June 2025, with a full AEP on the horizon and a clear mandate to perform.

03 NiCE solution

Visibility that made every decision possible

The implementation placed NiCE IEX WFM at the center of HPOne's workforce operation: scheduling, forecasting, real-time adherence, and intraday management came together in a single platform that WFM and Operations could use together. Real-Time Adherence and Intraday screens gave supervisors live visibility into agent activity for the first time, allowing both teams to identify staffing gaps in the same interval they occurred rather than discovering them after the fact.

The integration work went beyond HPOne’s own environment. In a first-of-its-kind configuration, HPOne partnered with a major Medicare insurance carrier to build a live data feed connecting that carrier’s CXone platform to both the carrier’s IEX instance and HPOne’s own IEX simultaneously. Workforce forecasting and staffing decisions on both sides of the partnership now run from synchronized, real-time data, eliminating the blind spots that come with managing a multi-organization AEP operation across separate systems.

HPOne also used the transition to bring agents from a second major insurance partner into its IEX environment, consolidating a large segment of the agent population into one unified WFM system ahead of AEP.

04 Results

HPOne’s first AEP on IEX – by the numbers

The first AEP on NiCE IEX WFM validated the move and validated the team that made it. Adherence improved by 10 percentage points year-over-year, the direct consequence of WFM and Operations running from the same real-time data for the first time.

The external recognition was equally clear. HPOne’s major insurance carrier partner called the AEP one of the smoothest in their shared history. A second major insurance partner delivered the same assessment at their annual business review. When the largest partners cite operational improvement in their own reviews, the transformation has landed.



05 Future

EEM, AI-driven intraday, and more value from the same headcount

HPOne is now rolling out Employee Engagement Manager across the operation. Schedule trading, make-up time, and VTO automation will give agents meaningful control over their own schedules while preserving the staffing precision that AEP demands. The goal is direct: WFM should drive more value with the same headcount, replacing manual scheduling interventions with intelligent automation.

AI-driven intraday staffing adjustments within IEX are on the roadmap. For an organization whose commercial model runs through a compressed enrollment window, that level of automated precision represents the next frontier of what NiCE Workforce Engagement Management can deliver for HPOne.

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Be curious and be inquisitive. Ask questions, be creative, and see what you can utilize IEX to really optimize your performance.

Matt Brewer

Director of Workforce Management, HealthPlanOne

About NiCE

NiCE is transforming the world with AI that puts people first. Our purpose-built AI-powered platforms automate engagements into proactive, safe, intelligent actions, empowering individuals and organizations to innovate and act, from interaction to resolution. Trusted by organizations throughout 150+ countries worldwide, NiCE’s platforms are widely adopted across industries connecting people, systems, and workflows to work smarter at scale, elevating performance across the organization, delivering proven measurable outcomes.

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