



Shaping Healthcare Possibilities

Success Story

Enhancing Efficiency with Salesforce Cloud for a Home Health Company

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Client Profile

We collaborated with a leader in the home healthcare sector, to overcome operational challenges caused by fragmented scheduling systems. Through our tailored solutions, we streamlined their appointment booking process, integrated critical platforms, and introduced specialized portals, dramatically enhancing their efficiency and service delivery.



Industry

Home Healthcare

How WILCO Supported

Facilitated the migration of multiple systems to an integrated Salesforce Health Cloud solution, enhancing efficiency and appointment booking with the addition of Salesforce Field Service.

Salesforce Tools Utilized

Field Service Lightning, Health Cloud, Shield, Digital Engagement, Experience Cloud, and Appointment Assistant

The Challenge

A key player in the home healthcare industry was facing a multi-faceted challenge that hindered their operational efficiency. Their primary concern was the use of multiple systems to schedule health assessments. This fragmented approach led to patients, providers, and customer support agents working in separate ecosystems, causing inefficiencies, data discrepancies, and communication breakdowns.

Manual calculations of time differences by agents were required. Additionally, agents had no visibility into travel distance and time, a vital feature for appointment scheduling in the healthcare sector.

The lack of integration between their existing system, Persivia, and Salesforce, further complicated their process. Overall, the lack of a unified system made it challenging to have a comprehensive view of provider workload and overall operational efficiency.

Fragmented systems,
disjointed operations and
miscommunications amongst
stakeholders.

Manual time zone
calculations added
complexities.

Lack of visibility into travel
time and distance.

Required integration between
Persivia and Salesforce.

The Solution

Understanding the intricacies of our client's challenges, we designed a comprehensive approach to bring cohesion and efficiency. The primary step was the introduction of Salesforce Field Service to centralize the appointment booking process. This transition addressed the fragmented booking and reduced a 10-step booking process down to a single, more intuitive step. Integration was also at the forefront of the solution. A bi-directional sync was established between Persivia and Salesforce Health Cloud, ensuring that data remained consistent across platforms. This integration alleviated the previously encountered data discrepancies. To cater to the diverse user base, self-servicing portals were launched. Patients received a dedicated portal to manage their appointments and notifications, while providers got their portal tailored to their needs. Business operation teams weren't left behind. We implemented reports and dashboards which provide for them clear, real-time KPIs.

Reduced 10-step
appointment booking
to a single step.

Salesforce Field
Service integration for
streamlined
operations.

Bi-directional sync
between Persivia and
Salesforce.

Specialized portals for
patients and providers.

Introduction of
real-time KPI
dashboards

The Outcome

The outcomes of our solutions were noticeable and transformative. Appointment scheduling, which was previously a tedious process, saw a drastic 50% reduction in time. This ensured that the client could serve their patients faster and more effectively.

With the establishment of data alignment between Persivia and Salesforce, the probability of data mismatches was eliminated. The consolidation from three separate systems into Salesforce marked a significant step towards streamlining operations and reducing overhead.

Stakeholders validated the effectiveness of the solution, giving positive feedback during the HyperCare phase.

- 50% reduction in appointment scheduling time.
- Data consistency achieved across platforms.
- Consolidation from three systems to one with Salesforce.





Shaping Healthcare Possibilities

Thank You

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