

CASE STUDY:

Methodist Family Health Increases Departmental Efficiency with Salesforce

A Legacy of Providing Care

Methodist Family Health has roots dating back to 1899 when it began as the Arkansas Methodist Orphanage. In the 12 decades that followed, it has grown into a complete continuum of care to meet the psychiatric, behavioral, emotional and spiritual needs of children and their families in Arkansas. During this time, they grew to a residential treatment system with therapeutic group homes throughout the state as well as counseling clinics, an emergency shelter, school based programs, an acute psychiatric hospital and more.

In 2003, a corporation for these endeavors was named Methodist Family Health, which manages Methodist Children's Home, Methodist Behavioral Hospital, Methodist Counseling Clinics and Arkansas CARES. To prepare the business for their growing enterprise, the first liaison was hired for the company in January 2010. Just one short year later, an entire business development team was created consisting of multiple community liaisons and clinical mobile assessors. Their role was to educate referral sources, court systems, DCFS, educators, social workers and any others who might refer patients for inpatient services available through Methodist Family Health's continuum of care.

Growing Pains

Strong leadership kept Methodist Family Health on a growth path through late 2016; however, the administration and business development team felt opportunities were being missed due to lack of the right technology. Executives were unable to track or have visibility of activities by the outreach teams resulting in lack of analytic data for growth. There were bottle necks in the process due to lack of consistent reporting. The manual process for reporting created a drag on productivity and the disconnected, dated technology in their scheduling

66% increase in inquiries for services tracked

85% increase in inquiries from one of the largest referral partners

50% decrease in the amount of time required for administrative tasks

application often meant liaisons arrived at meetings having no idea if the referral partner they were seeing had referred one potential patient or 20 that week -or even if they had ever referred. Additionally, they were using JOT forms (an application created in house) to enter calls or submit referrals in the field, but the data didn't integrate with the main database. This made it impossible for the team to track their ROI or lack thereof. Inquiries came in through admissions and were tracked via email with no referral attribution. Change was needed for this fast-growing company to be able to drive referrals more successfully in this ever-changing market.

Right Partner at the Right Time

When Virsys12 was introduced to the organization, Methodist Family Health had purchased Salesforce licenses, but they were not configured to meet Methodist's business development needs. The software was underutilized by the team. After extensive discovery with Virsys12, the teams

reached agreement around a phased approach to manage referrals and track admissions and inquiries alike, as well as to ensure adoption of the technology. Additional decisions included converting from older systems, which were not designed for the reporting needs such as Census Tracker. This meant the path to productivity was close at hand, and Virsys12 had the plan. The move to Salesforce also gave the team mobile technology on the go to do their jobs more efficiently.

Results by the Numbers

Change management was a priority along with the system reconfiguration to a true referral management and admissions process. The feedback from the Methodist team says it all.

“As a liaison, this system gives us everything we need on our laptop, cell phone or desktop in real time. I’m able to find specifics at my fingertips, and update records with what I’m learning on the ground,” according to Amanda Pierce, director of business development, Methodist Family Health.

In the first quarter since launch, the team has seen a 66 percent increase in inquiries for services tracked and up to 85 percent increase in inquiries from one of their largest referral partners. Productivity has increased with a 50 percent decrease in the amount of time required for administrative tasks, accelerated by the ability to enter information by cell phone as needed. There has been a 57 percent drop in undocumented inquiries, adding to the efficiency of the team. Overall, Director of Assessment and Referral Chris Kozlowski reports his department has improved from 94 percent to 99 percent efficiency.

Pierce continues, “Salesforce gives us the ability to track referrals by agency type, referral source, referral contact or any other parameter we choose. We can adjust reporting as needed with ease to answer any questions or problem-solve any issues that arise in turn allowing us to shift our business strategy as needed.”

“Salesforce gives our admissions department the ability to track data in real time and use the dashboards to work with collective data as a team. Using the analytic data it provides, it gives us a starting point to see each referral through to closed status, and everyone is on the same page. This makes for a much more fluid process than ever before.”

Amanda Pierce

Director of Business Development
Methodist Family Health

Next Steps

As successful adoption of the new system has generated strong results, the team has undertaken additional Salesforce training for the Salesforce Lightning user interface. Future road map items include integration of the call center with Salesforce and verification of benefits plus several marketing initiatives. Virsys12 continues to provide ongoing support as the team expands. If the reaction to those enhancements is anything like what the team feels now, the future is bright.

“It has changed my everyday life and the way I do my job. If I need information, it is right there,” concludes Pierce

