



Catapult Rehabs ONR's Internal Communications Processes

Microsoft Dynamics solution centralizes employee and customer data

Orthopaedic & Neurological Rehabilitation, Inc. (ONR) provides physical, occupational and speech therapy services to hospitals and skilled nursing facilities nationwide. Impressive business growth over the past 20 years caused ONR to outgrow its internal communications infrastructure.

The company's many home-based employees are spread across 10 states, making sharing information and standardizing business practices difficult. ONR's communications challenges spanned the company. Business development team members maintained their contacts and lead lists in spreadsheets on their personal computers, which prevented centralized reporting and unification of the sales process.

The company's recruiters were using an old, internally developed Access database that was hard to access remotely and difficult to change. Additionally, ONR's recruiters could not share information with management beyond email or fax.

At the corporate office, the customer service team had no means to track issues and communicate those issues to the affected staff or management. Finally, the company wanted to improve the start-up process for new facilities to make the operation flow more smoothly.

The company had attempted several different means for sharing information, including public folders, but none had met its needs. Catapult Systems, already engaged on an ONR infrastructure project, suggested Microsoft Dynamics CRM as a solution.

After researching many CRM options, ONR concluded that Dynamics was an excellent solution to help centralize contact information, as well as streamline and standardize operations.

Catapult's familiarity with ONR's infrastructure and expertise with Dynamics made it the natural choice for designing and implementing the new system.

How Catapult Systems Helped

ONR required its new CRM system to not only solve individual department problems, but also enable seamless collaboration and information-sharing between departments. In order to address these needs, Catapult started by gathering requirements for all of the departments to create a comprehensive plan. With this overarching plan in place, Catapult implemented Dynamics in a phased approach.

The team began with the business development department, enabling contact and lead centralization, pipeline management and new reporting functionality. Catapult also developed a data import process, allowing business development sales representatives to import lists, such as from Medicare, for mining of new sales opportunities. In addition, Catapult's solution enables the reps to work off-line and sync to the central database when online via an Outlook client.

Next, Catapult implemented Dynamics for the recruiting team, linking information from multiple sources. Catapult created an import process which enables ONR recruiters to import state therapist license information into CRM to mine for job candidates. Catapult also developed customized workflows for the recruiting team, which launch when a new recruit is identified, to help with the new recruit provisioning process.

With benefits for both ONR recruiters and management, the Catapult team linked ONR's HR system to Dynamics, allowing employee information to be automatically updated nightly.

“I can’t say enough about how pleased I am with Catapult. They did a fantastic job of understanding our challenges and translating those into a solution that has touched every area of our company.”

Steven Williams | CIO, ONR Inc.

Additionally, Catapult integrated Dynamics with ONR’s in-house patient data collection system, enabling reporting on services provided by therapists.

The final stage of development was to create workflows to standardize processes for customer service and new facility start-up activities. The customer service workflows launch different tasks based on the type and severity of the case, and automatically communicate the issue to the involved parties.

The new office start-up workflows enable operations managers to easily manage all start-up tasks such as ordering equipment, office supplies, telecommunications and security measures. The system also helps the company follow-up on new launches by creating a separate set of tasks for 30-day and 60-day reviews.

In addition to implementing Dynamics, Catapult developed custom training manuals using ONR’s screens and conducted training for employees in home offices across the nation using Live Meeting. ONR’s new Microsoft CRM system operates on Windows Server and uses SQL Server, Exchange Server and Outlook. The company plans to further enhance the system by automating sales reports and adding additional workflows, such as denials and asset management.

Results

ONR management enjoys improved visibility into the company. Centralized data enables access to up-to-date information on customers and employees. Improved reporting on all aspects of the organization has provided better insight into customer service and operational issues. In addition, the company has realized:

- Reduced overhead through streamlined recruiting, customer service and facility start-up processes.
- Additional sales and recruiting opportunities due to enablement of data mining.
- Improved internal communications between departments, management and remote employees.
- Reduced chance of data loss and improved reporting capabilities due to centralized data.



How can we help you?

Contact us at 1-800-528-6248 or info@CatapultSystems.com