



Invitae's Salesforce-Driven Operational Excellence

A Case Study on Secure Email Solution for Invitae

CLIENT OVERVIEW

Invitae, a leading genetic testing company, provides comprehensive and accessible genetic testing solutions to guide critical health decisions for patients and healthcare providers. Healthcare providers fill in test orders (Test Requisition Forms - TRFs), which include crucial information about the patient, insurance, provider, billing (including diagnostic codes), test type, specimen type, patient history/reason for testing, and patient informed consent. The Data Processing Team (DPT) meticulously verifies the completeness of TRFs, and when details are missing, Customer Service Representatives (CSRs) must reach out to providers to gather the required information. This verification step is vital as incomplete orders can delay testing, compromise specimen integrity, and impede timely diagnosis and treatment.



CHALLENGES

The previous process required the DPT to create a case with a "reason" code for missing information, which was then assigned to CSRs for outreach. CSRs manually composed secure emails, tracked responses, and forwarded the information to the DPT. This process faced several challenges:

- ▶ **High Labor Costs:** CSRs spent 15 minutes per order, needing 6.25 FTEs for 1,000 weekly "incomplete" orders.
- ▶ **Delayed Processing and Tracking:** Information from providers delayed testing and result releases; significant time spent on follow-ups and manual tracking of unresponsive providers.
- ▶ **Inaccuracies:** Frequent errors in patient details led to repeated outreach.
- ▶ **Security Concerns:** Sharing patient information through multiple touchpoints outside the central repository posed data privacy and security risks.

SOLUTIONS

Cloud Maven, INC. implemented a secure encrypted email solution within Salesforce, integrated with Invitae's Testing and Order Management System:

Automated Email Composition:

- ✓ Standardized templates for 60 missing information reasons were automatically populated with order, patient, and provider details. Emails were composed and sent within Salesforce, reducing manual intervention and CSR efforts.

Improved Tracking and Governance:

- ✓ Cloud Maven, INC.'s built-in tracking component within Salesforce monitored sent and received emails, enhancing governance and automating the follow-up process with dashboards and time/event triggered follow-ups.



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BENEFITS



1

Annualized OPEX Reduction:

CSR efforts were reduced by 6.25 FTEs, saving 400K USD annually. Efficiency gains were seen in outreach per incomplete order and tracking.

2

Reduced Turnaround Time:

Time to obtain missing information was reduced from 2.5 days to 4 hours, accelerating testing and results issuance.

3

Improved Tracking and Governance:

Automated tracking of emails and responses through dashboards and time-triggered follow-up emails ensured better governance over the process.

4

Enhanced Quality and Accuracy:

Automated secure email eliminated manual errors, enhancing communication quality and data accuracy while reducing repeated follow-ups.

5

Increased Data Security:

A centralized secure email system within Salesforce reduced the risk of data privacy and security breaches and improved compliance.

CONCLUSION



Cloud Maven, INC's secure encrypted email solution is a native plugin to Salesforce. It has improved Invitae's process for handling genetic test orders by automating outbound email workflows. The solution reduced operational costs, enhanced efficiency, and improved data security and accuracy. This transformation optimized resource utilization and ensured the timely processing of test orders, benefiting patients and healthcare providers by providing quicker and more reliable genetic testing results.



\$400K
Annual cost saving



4 HOURS
Turnaround time
(From 2.5 Days)



15,000
Labor hours saved
annually

Secure Email



HIPAA Complaint & HITRUST Certified Email Automation Solution

- End-to-end encryption powered by Paubox.
- No portals, passwords, or extra steps needed.
- Real-time email tracking and analytics.
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