

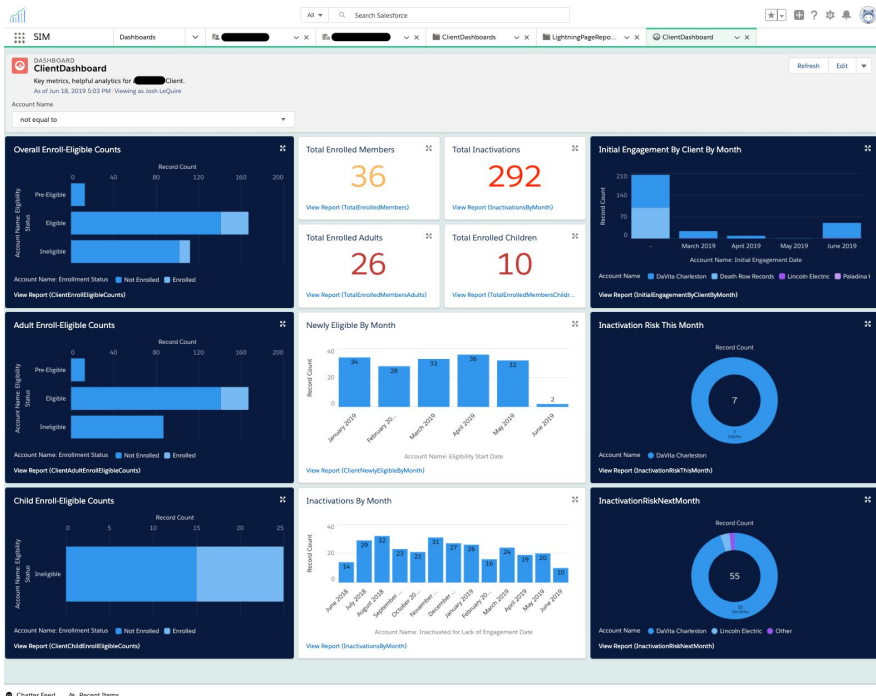


Lightning Dashboards and Reports



Data Driven Decision Making Insights

The Challenge



This membership based organization delivers healthcare (primary and urgent care) services to its membership base through Salesforce Health Cloud. Activation and retention are massively important to this organization, as clients hold contracts that allow them to forgo membership (and even recover payments) if enrollments and initial appointments are not set within defined timeframes. To manage this risk, this organization needed to see critical data points in real time and forecasted across clients, so that they can drill down and focus on key risk items approaching to get in front of those.

Further, key data for these insights come not only from Health Cloud but also from their EHR patient record management tool. Data in Health Cloud would need to reflect these updates in real time as well.

The Solution

theCodery worked closely with this organization to understand these key metrics closely, the business processes (key personas, flows, inputs, processing, and outputs), and data model needed to support these analytics. We applied an agile, iterative approach to engineer these dashboards and reports to ensure users had exactly what they need at various levels of visibility and usage: operational, managerial, and executive.

Further, we partnered with our client and their IT vendors to drive a cogent systems integration architecture and optimal, performant data model knowing data would need to flow into these views from many systems, in real time. With the Codery's intimate knowledge of Salesforce governors and limits, we designed, built, consulted, and tested partner solutions to allow for proper data residency, authority (source of truth), and synchronization to ensure completeness and correctness across systems.

Looking to build your business on data driven insights and analytics? [Contact us today.](#)

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