

TRANSFORMING OPERATIONAL EFFICIENCY IN A NOT-FOR-PROFIT PUBLIC HEALTHCARE ORGANIZATION



Industry

Not-for-Profit Public Healthcare Organization



HQ

Florida



Employees

50+

Client Overview

The client is a public/private funded not-for-profit public healthcare organization specializing in pre- and postnatal care. They operate multiple programs that support women through pregnancy and early parenting, offering services such as mental health care, doula, lactation, hospital visits, and group support sessions. The organization serves thousands of patients annually through direct care and field-based staff, supported by a back-office team of over 30 employees.

Due to their broad scope and complex service delivery models, the organization faced an increasingly chaotic operational environment, further complicated by stringent reporting obligations to state agencies and private donors. Prior to working with TechOps Partners, they had engaged a digital transformation firm that failed to grasp the intricacies of their needs, leaving them with an incomplete and ineffective Salesforce setup.

Challenge

The primary issue was a lack of data centralization and a fragmented reporting structure. The organization struggled with dozens of data silos, where information was stored across spreadsheets, third-party SaaS platforms, and internal departmental systems. Service delivery staff had no streamlined method to report outcomes, and administrative staff had no reliable system for compiling data across programs.

Compounding this was the need to notify staff when care sessions were completed so they could pull required data from state systems and input it into Salesforce. They also needed standardized, easy-to-distribute performance surveys and automated reporting to meet funding requirements.

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Objective

To address these challenges, TechOps Partners began with a discovery-driven approach focused on defining operational goals and reverse-engineering the necessary workflows. The primary objectives included:

- Gain a complete understanding of human and technical processes across all programs
- Design clear, outcome-driven workflows aligned with real-world use cases
- Simplify communication from point-of-care staff to administrative staff
- Consolidate multiple platforms and data sources into Salesforce
- Ensure consistent, automated data collection across all programs
- Enable automated, custom reporting for state agencies, donors, and internal stakeholders

Solutions

TechOps Partners delivered a highly customized Salesforce solution supported by intuitive tools, automated workflows, and an innovative documentation approach. Key elements of the solution included:

- Custom-built, mobile-friendly data submission forms for each program
- QR code-enabled check-in for group sessions, feeding real-time data into Salesforce
- Automated patient surveys triggered post-session, with SMS/email reminders
- Interactive, integrated calendars for event creation and patient self-registration
- Task-based workflows to notify administrative staff as care sessions are completed
- Custom dashboards and scheduled reports for granular insights across all programs
- Elimination of seven separate applications, fully integrating operations into Salesforce
- **Each new process was fully documented using AI-generated user training videos, visual diagrams, and comprehensive written documentation**
- **All resources were made accessible through Tech Ops Partners' proprietary AI-driven FAQ tool**, allowing employees to query an AI assistant and receive instant answers about operational workflows and processes

Approach

The workflow design process follows Tech Ops Partners' **Blueprinting methodology**, honed over the last 20 years through hundreds of client engagements. This structured approach ensures that every process contributes to strategic goals and is designed for measurable impact.

The steps include:

1. Begin by identifying the high-level objectives the client aims to achieve
2. Drill down to map each individual process that influences the high-level objective
3. Define the specific desired outcome for each process and how it supports the overarching goal
4. Design both the **human and digital workflows** required to achieve that outcome
5. Where needed, develop **dozens of interconnected processes**, each contributing to the larger objective
6. Apply a reverse-engineering approach—starting from the outcome and working backward into system and user requirements
7. Use detailed stakeholder engagement, prototyping, testing, and training to ensure clarity and adoption
8. Align all process designs within a parent-child framework to maintain consistency and visibility across operations

Results

The implementation delivered significant operational and strategic benefits across the organization:

- **Time Savings:** Staff saved dozens of hours each month that were previously spent manually gathering and compiling data into reports for state agencies, private donors, and internal leadership
- **System Consolidation:** Approximately seven disparate applications were eliminated, replaced by a centralized Salesforce platform serving as the single source of truth and system of record
- **Operational Streamlining:** Uniform, documented processes replaced a patchwork of inconsistent workflows
- **Improved Data Accessibility:** Administrative teams gained full visibility into cross-program data, drastically reducing the time needed to locate information
- **Enhanced Staff Efficiency:** Point-of-care staff now use intuitive web forms to submit data, replacing inconsistent communication methods like email and text